

Impact Austin 2022 Nonprofit Workshop Spring Grants

Welcome from Grants Team

Anne Helmick-Lyon GRC Coordinator Impact Austin



Meeting Agenda

4:05 - 4:15 Welcome

Christina Gorczynski, Impact Austin Executive Director

4:15 - 5:00 Impact Austin Grant Process Overview

Anne Helmick-Lyon, Impact Austin GRC Coordinator Melissa Lorber, Impact Austin Nonprofit Coordinator Margaret Ballinger, Impact Austin Grants Finance Committee

5:00 – 5:10 Grant Process Experience

Rebecca Lightsey, American Gateways Co-Executive Director

5:10 - 5:30 Q&A

Marla Whelan, Impact Austin Grants Co-Chair Margaret Ballinger, Impact Austin Grants Finance Committee Rebecca Lightsey, American Gateways Co-Executive Director



Opening Remarks

Christina Gorczynski Executive Director Impact Austin



Our **Mission**



We cultivate and expand the knowledge, passion, and generosity of our members to make a positive impact by developing strong relationships and leveraging the power of collective giving.

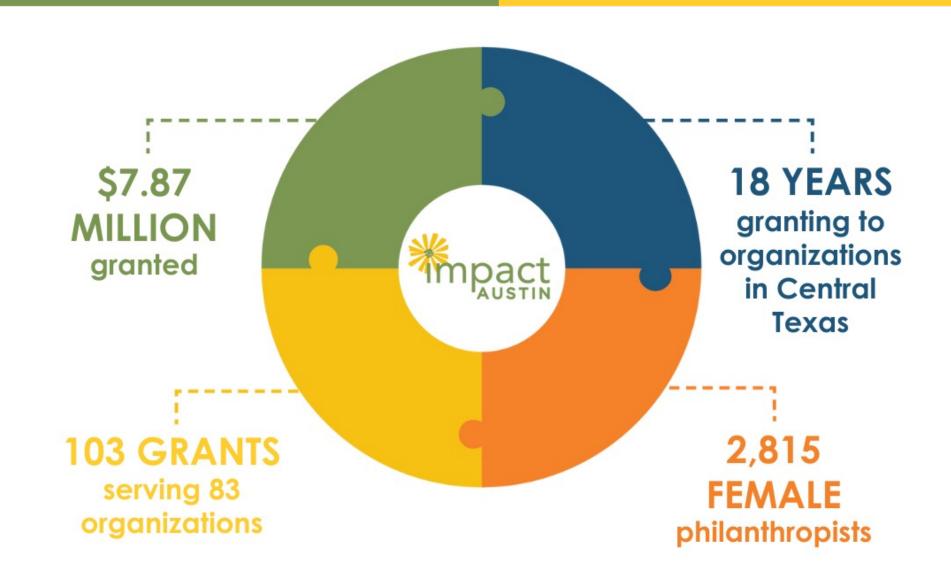
Our **Vision**



To unlock the potential in our community by uniting to fulfill our philanthropic purpose.



Our Collective Impact



Our **Values**



INCLUSIVITY We welcome all women with a passion to give and a desire to grow.



EMPATHY We care deeply about our community, partners, and fellow members.



CURIOSITY We are a learning organization that educates members on community needs and solutions.



IMPACT We challenge ourselves to give of our time, expertise, and financial resources to address systemic challenges facing our community.

Our Year: **2021**

- Year-Round Membership Recruitment
- 435 members eligible to vote on Fall 2021 grants
- Two Grant Cycles in the Fall and Spring
- Total 2021 IA and g3 grants: \$430,000 to 9 nonprofits

Spring 2022 Grant Amounts will be announced on January 10th via email and social media.

2022-2023 **Grants Summary**

EVERY GRANT CYCLE, IMPACT AUSTIN MEMBERS **WORK TOGETHER** IN GRANT REVIEW COMMITTEES TO NARROW THE APPLICANTS TO **TWO FINALISTS** IN EACH FOCUS AREA.

The top vote getter will receive the primary grant, **80% of the total** dollars collected for that focus area. The other finalist will receive the secondary grant, **20% of the total** dollars collected. The grant amounts are now announced at the start of each grant application period.

2022-2023 Grants Summary



GIRLS GIVING GRANT | APRIL 2022-2023

To improve the lives of youth in the community



COMMUNITY GRANT | JUNE 2022-2023

To enhance economic, social, environmental, or cultural initiatives



EDUCATION GRANT | JUNE 2022-2023

To enhance education and learning



HEALTH & WELL-BEING GRANT | NOVEMBER 2021-2022

To strengthen and enhance the lives of children and families, or positively impact the mental or physical health and wellness of people



EQUITY GRANT | NOVEMBER 2021-2022

To advance equity for women and girls of color



Save the Date **Discovery Days**

January 21, February 4, and February 18

- •REAL PEOPLE, REAL EXPERIENCES
 - •FRI, JAN 21 12:00 1:30 PM
- BUILDING TRUSTED PARTNERSHIPS
 - FRI, FEB 4 12:00 1:30 PM
- FUNDING LANDSCAPE IN CENTRAL TEXAS
 - FRI, FEB 18 12:00 1:30 PM



How to **Get More Involved**

VOLUNTEER

- Share the gift of your time, talent, and connections!
- Sign up on our website
- Invite a friend to join: See a list of our events and share our website with friends





How to **Get More Involved**

FINANCIAL SUPPORT

- Join or renew your **membership** with \$1,250
 - •Go to our ImpactAustin.org and pay online using monthly or one lump sum payment, or pledge today by filling out the membership form
- Join the Philanthropy Circle with a \$250 donation to our Annual Fund
 - •Go to ImpactAustin.org and make a one-time or sign up for monthly recurring donations





Grants Overview

Anne Helmick-Lyon GRC Coordinator Impact Austin



Grants Overview

- Streamlined application and review processes Spring and Fall grant cycles, 2 focus areas per cycle
- A grant proposal can:
 - Support programs or projects: existing programs or projects or new programs that target a specific population, last for a specific duration, and aim to achieve specific, measurable goals; and/or
 - Support capacity: strengthen or grow a nonprofit organization to improve its future performance, impact, and sustainability in support of its mission and vision, producing measurable results for the organization by the end of the grant period.
 - Both are considered Initiatives
- Proposals can be by single organizations or collaboratives
- Grant amounts will be based on membership levels and announced at the start of each grant cycle (January 10, 2022 for Spring Grants only)
- All finalists are awarded a grant and become Community Partners primary award is 80% of total grant amount, secondary award is 20%
- 20% of the primary grant is unrestricted; all of the secondary grant is unrestricted
- Broader equity lens in grantmaking
- More information at https://www.impactaustin.org/post/introducing-a-streamlined-grants-process

General Eligibility Guidelines

- An eligible organization must:
 - Be a public charity (not a private foundation) with tax-exempt status under Section 501(c)(3) of the Internal Revenue Service Code
- Applicants applying as a collaborative must:
 - Identify one lead organization to submit the application, and that organization must meet the eligibility guidelines
- An initiative must:
 - Provide services in Bastrop, Hays, Travis, and/or Williamson counties
 - Plan to expend the grant funds within 24 months
 - Use the entire grant amount (no partial grants)
 - Identify the focus area for the application Community and Education for Spring 2022; Health & Well-Being and Equity for Fall 2022
 - Organization must not have received an Impact Austin Grant within the time frames posted in the Impact Austin Grant Application Guidelines



What We Will Not Fund

- Debt reduction
- Endowments/memorials
- Bridge funding or interim financing
- Operational deficits
- Partisan, political lobbying or legislative activities
- Fundraising activities or events
- Sports teams or any sports-related activity or competition
- General capital campaigns, general construction, or renovation unrelated to a specific proposed initiative

- Fraternal, sectarian, and religious organizations where the grant is intended for the principal benefit of the organization's own members or adherents, or where the grant is intended for inherently religious activities
- Legal expenses incurred in any action by or against the organization
- Advertising



Grants Summary

• Impact Austin Grants will be awarded to local nonprofits in each of these focus areas:

Grant	Description	Award Date
Community	Enhance economic, social, environmental or cultural initiatives	June 2022
Education	Enhance education and learning	
Equity	Advance equity for women and/or girls of color	
HADITH X	Strengthen and enhance the lives of children and families, or positively impact the mental or physical health and wellness of people	Nov 2022



Five Key Criteria

Credible – *organization* is reliable and trustworthy; strong record of achieving its goals; has a solid reputation within the community

Capable – *organization* can turn good ideas into reality; has competent and qualified staff, as well as the structure and systems to achieve its goals; strong board; prior success

Committed – *organization* considers the initiative to be a priority, to complete the initiative with or without us; has plan to continue the initiative beyond our grant

Feasible – *initiative* can be done; budget supports the outlined tasks and strategies; timeframe seems reasonable

Significant – *initiative* should be done; meets an important need within the community; works to resolve the issue addressed

Review Committees

Grant Review Committees (GRC) are responsible for implementing Impact Austin's grant process and choosing two finalists per focus area. Members complete training on Impact Austin guidelines and grant evaluation.

The **Grant Finance Committee (GFC)** consists of Impact Austin members with strong financial experience and skills who serve as financial consultants for the grant review committees in the review of financial information provided by the nonprofit organizations.



Grant Process Overview

Melissa Lorber Nonprofit Coordinator Impact Austin



Grant Process Overview

Grant Application Process

Phase I: Grant Application

Phase II: Site Visit

Phase III: Presentation and Vote



Phase I: Grant Application

The Grant Application describes the proposed initiative, with supporting documentation, and should clearly answer what are you doing, who are you doing it for, when will you do it, and where and why are you doing it?

The Grant Application asks about six topics:

- Organization
- Initiative Description
- Goals, Measurement and Evaluation
- Funding and Sustainability
- Equity
- Collaborators

Required attachments include organizational financials, initiative budget, audit, Form 990, Board and staff information, and collaborator commitments. (Financial documents will be discussed in more detail attachments presentation.)

Phase II: Site Visit

Three organizations are selected by each Grant Review Committee for site visits

Applicants selected for a site visit will host members of the Grant Review Committee at their facility or a location of their choice (Site visits were conducted virtually in 2021 but may be in person for 2022)

Purpose: To meet the people behind the organization and gain first-hand observations and impressions

- •Part 1: Introductions, tour, project overview
- Part 2: Panel interview / Q&A
 - Executive Director
 - Project/Program Director
 - Board Member
 - •Financial Representative

Following the site visit each Grant Review Committee will select two Finalists to present at the Annual Meeting for Spring 2022



Phase III: Presentation and Vote

- Voting in the Spring may be done before or during the Annual Meeting
- If you are selected as a finalist, there will be a Finalist Training session on May 6, 2022, to give you all the information necessary
 - The Finalist Packet includes the Finalist cover letter, Finalist Report, and Initiative Budget
 - The materials are prepared jointly by Grant Review Committee (GRC) Chairs and the nonprofit and are provided to the full Impact Austin membership
 - The Finalist Packet could also include a video if voting is completed before the Annual Meeting; if voting is completed at the Annual Meeting, you will be asked to give a fiveminute presentation that evening
- The nonprofit with the most votes in each focus area will receive a grant for 80% of the funding; the nonprofit with the second most votes will receive a grant for 20% of the funding
- Members and Finalists are notified during the Annual Meeting on June 6, 2022

Key Grant Dates

- 01/06/2022 Impact Austin Spring 2022 Nonprofit Workshop
- 01/10/2022 Grant applications open for submission
- 02/08/2022 Grant applications close at 5:00PM CT
- 03/10/2022 Initial grant review decisions communicated
- 04/07/2022 Semifinalist decisions communicated
- 04/21 04/23/2022 Site visits
- 05/05/2022 Finalist decisions communicated; all other applicants declined by this date
- 05/06/2022 Finalist training
- 05/17/2022 Finalist reports distributed to Impact Austin members to begin voting
- 06/06/2022 Impact Austin Annual Meeting; Community Partners announced
- 07/01/2022 Spring grant awards issued

Grant Management System

- Impact Austin will start accepting Applications for Spring 2022 Grants starting January 10
- All grant proposals must be submitted using the Impact Austin Grant Management System (Zengine)
- Access the Impact Austin Grant Management System with the following link:

 <u>https://webportalapp.com/sp/ia_grant_application_or go to the Grantmaking section on the Impact Austin website at www.impactaustin.org/grantmaking. (Look for this blue box: "Open Grants Management System")

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Membership Grantmaking Girls Giving Grants Events Blog & News Contact Us

Open Grants Management Syster

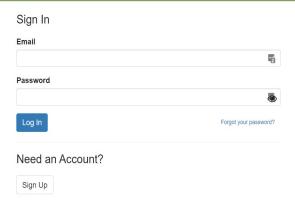
ELIGIBILITY GUIDELINES GRANTS CALENDAR APPLICATION PROCESS

- Organizations must submit the grant application online via the Impact Austin Grant Management System by the submission deadline, including supplemental documents.

 Start applications early so we can assist with questions and issues!!
- If you have any questions, contact us at grants@impactaustin.org



Grant Management System



You will see two options

- 1) Sign In
- 2) Need an Account?
- Most of you will use the "Log In" option—only use the "Need an Account?" option if your organization
 has never applied for an Impact Austin grant
- If your organization has previously applied for an Impact Austin grant, the organization has a Profile in the grant management system—do **not** use the "Need an Account?" option to create a duplicate Profile
- If you do not know (or want to change) the email or password associated with your agency's Profile, email us at grants@impactaustin.org
- Your agency cannot have two emails associated with the Profile, but we can change the login to a new email and allow you to reset the password
- **Only** if your organization is new to Impact Austin, use the "Need an Account?" option, and you will create an agency Profile as part of the grant application process



Lessons Learned

<u>Lesson 1</u>: It will take time to gather and upload all the requested supporting documents that need to be filed with the Grant application. (All supporting documents must now be filed with the initial application.)

<u>Lesson 2</u>: It is important that you provide all of the requested financial information and that you take time in preparing your initiative budget—ask us if you have questions.

<u>Lesson 3</u>: If you accidentally create a duplicate agency Profile and the grants management system will not let you save your application because the agency's EIN is already associated with a Profile, STOP and contact <u>grants@impactaustin.org</u>. (We can fix it!) Do **not** attempt to alter the EIN and proceed.

<u>Lesson 4</u>: Grant recipients (Community Partners) receive a full membership in Impact Austin. A female representative from the organization is invited to participate on a Grant Review or other Impact Austin committee.

Financial

Margaret Ballinger Grants Finance Coordinator Impact Austin



Financial Requirements

- All required financials documents (see slides 33 36) must be submitted by the due date—late submissions will <u>not</u> be accepted.
- Please double check your submission to be sure all required documents are included.
 Missing, incomplete, or incorrect financial documents will disqualify the NP for this cycle.
 - If you do not have data for a specific item (e.g., Collaborators, Litigation, Audit), upload a note stating that you do not have this data/it is not applicable.
 - Recommendation is to submit before the last day so there is time for you to doublecheck what you submitted.
- If you have questions about the financial documents, please contact grants@impactaustin.org



Required Financial Documents

Initiative Budget

- The Initiative Budget focuses on the program, project, or initiative for which you seek the Impact Austin Grant.
- If the Initiative requires more funds than the Grant, use the Other Funds column to detail other funding sources.

An organization can support one or multiple "initiatives".

- If the organization is requesting our funding for one distinct initiative for which no other funding is required, then the other funding column would be blank.
- If the organization only does one thing and it is requesting our funds to support that "initiative," then the other funding column would be the rest of the organization's budget for the same time period.
- If the organization does three things (three initiatives) and it is requesting our funds to support one initiative, then the other funding column would only be the other funding required to support that one initiative for the same time period.

Required Financial Documents

Organization Financials

- Current Year Organization Budget with Year-to-Date Actuals
- Statement of Activities (Income and Expenses) for the most recently completed fiscal year
- Statement of Financial Position (Balance Sheet) for the most recently completed fiscal year
- Financial Narrative
- Audit (if available) a financial review or compilation is also acceptable
- Form 990 (most recently filed)
- **Funding Sources**: list entities (e.g. Foundations, Corporations, Governmental agencies, etc.) funding your organization for the current year and most recently completed fiscal year



Required Financial Documents

Board Information

- Listing of Board Members, including affiliations
- Summary of Board demographics

Staff Information

- Current organization chart showing names and positions
- Brief resumes of key staff, including qualifications relevant to the specific initiative
- Summary of staff demographics
- Insurance Certificate of Insurance
- Litigation
 - List of actual or threatened litigation or regulatory proceedings, investigations, or governmental actions involving your organization in the last two years, with a brief description of the basis for each
- Collaborators (if applicable)
 - Letter(s) of commitment from organizations collaborating on the Initiative



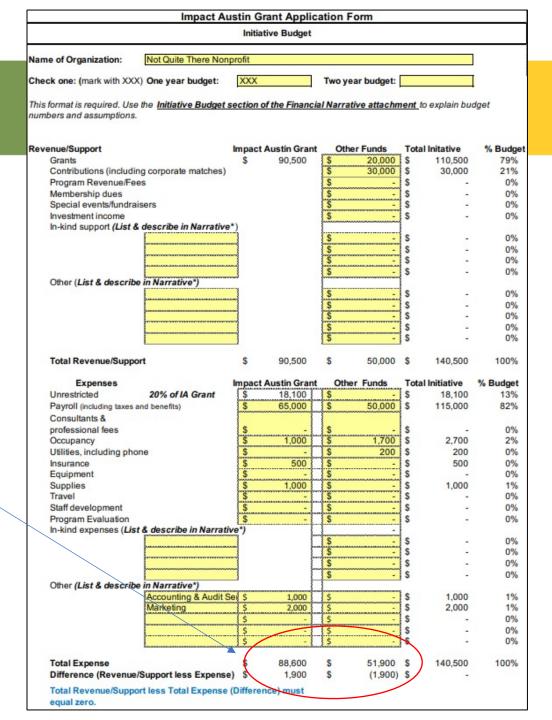
Financial Requirements

KEY AREAS TO REVIEW BEFORE SUBMISSION OF YOUR APPLICATION

- On the Initiative Budget, Revenue less Expenses must equal zero, both for the Impact Austin Grant and Other Funding
- Budget term (one year or two years) must match the term of the grant application
- Budget amount on the Initiative Budget should equal the amount on the Proposal Cover Sheet
- FTEs associated with the Initiative should be included on the Initiative Budget
- In Kind Revenue should equal In Kind Expenses
- The Financial Narrative should explain key points about your financials that are not obvious to someone outside your organization
- If you have questions about the financial documents, please contact grants@impactaustin.org.

Example 1

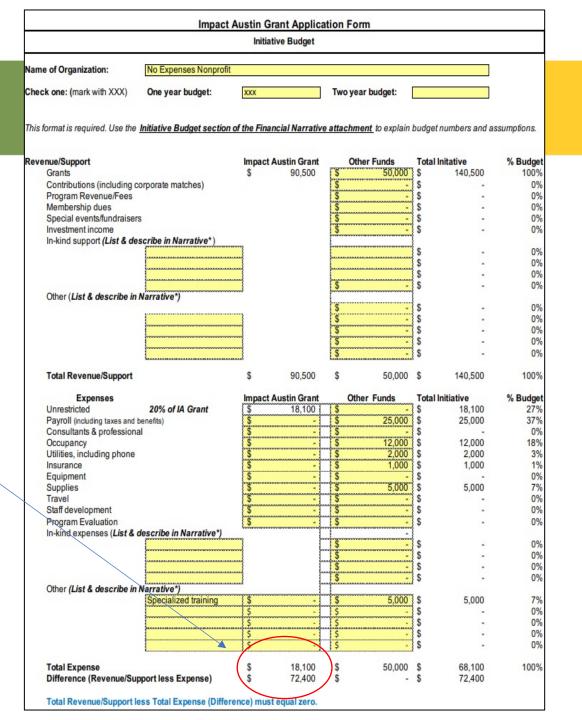
Difference for Impact
Austin and Other Funds
does not equal zero...each
difference needs to equal
zero - Disqualified





Example 2

No expenses listed for Impact Austin - Disqualified

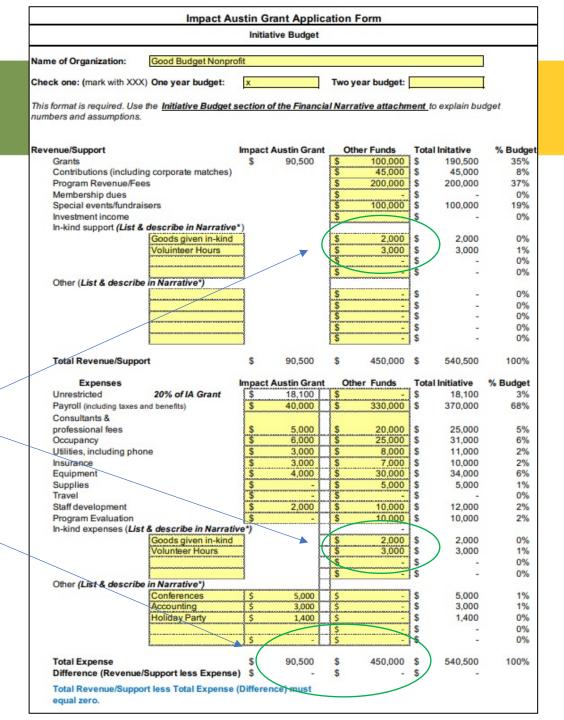




Example 3

In Kind Revenue and In Kind Expenses match and;

Difference for both Impact Austin and Other Funds is zero...Accepted





Community Partner

Community Partner Grant Experience

(A Community Partner is a current or former recipient of an Impact Austin grant)

Rebecca Lightsey
Co-Executive Director
American Gateways



Q & A

Moderators

- Melissa Lorber, Impact Austin Non-Profit Coordinator
- Fay Evans-Martin, Impact Austin Non-Profit Coordinator

Panelists

- Marla Whelan, Impact Austin Grants Committee Co-Chair
- Margaret Ballinger, Impact Austin Grants Finance Coordinator
- Rebecca Lightsey, American Gateways Co-Executive Director



Additional Resources

Detailed information about the Grantmaking Process is available at https://www.impactaustin.org/grantmaking

If you have questions, please contact Impact Austin's Nonprofit Coordinators at grants@impactaustin.org





Thank You!