Impact Austin
2023 Nonprofit Workshop
Spring Grants

Spring 2023| Impact Austin

Meeting Agenda

12:05 – 12:15   Welcome
                 Karen McLinden, Impact Austin Grants Co-Chair
                 Demetria George Caston, Impact Austin Executive Director

12:15 – 1:00   Impact Austin Grant Process Overview
                 Melissa Lorber, Impact Austin Grant Review Coordinator
                 Fay Evans-Martin, Impact Austin Nonprofit Coordinator
                 Lauren Lewis, Impact Austin Grants Finance Coordinator

1:00 – 1:10   Grant Process Experience
                 Kathleen Schneeman, Executive Director, Explore Austin

1:10 – 1:30   Q&A
                 Karen McLinden, Impact Austin Grants Co-Chair
                 Michelle Rankin, Impact Austin Grants Co-Chair
                 Lauren Lewis, Impact Austin Grants Finance Coordinator
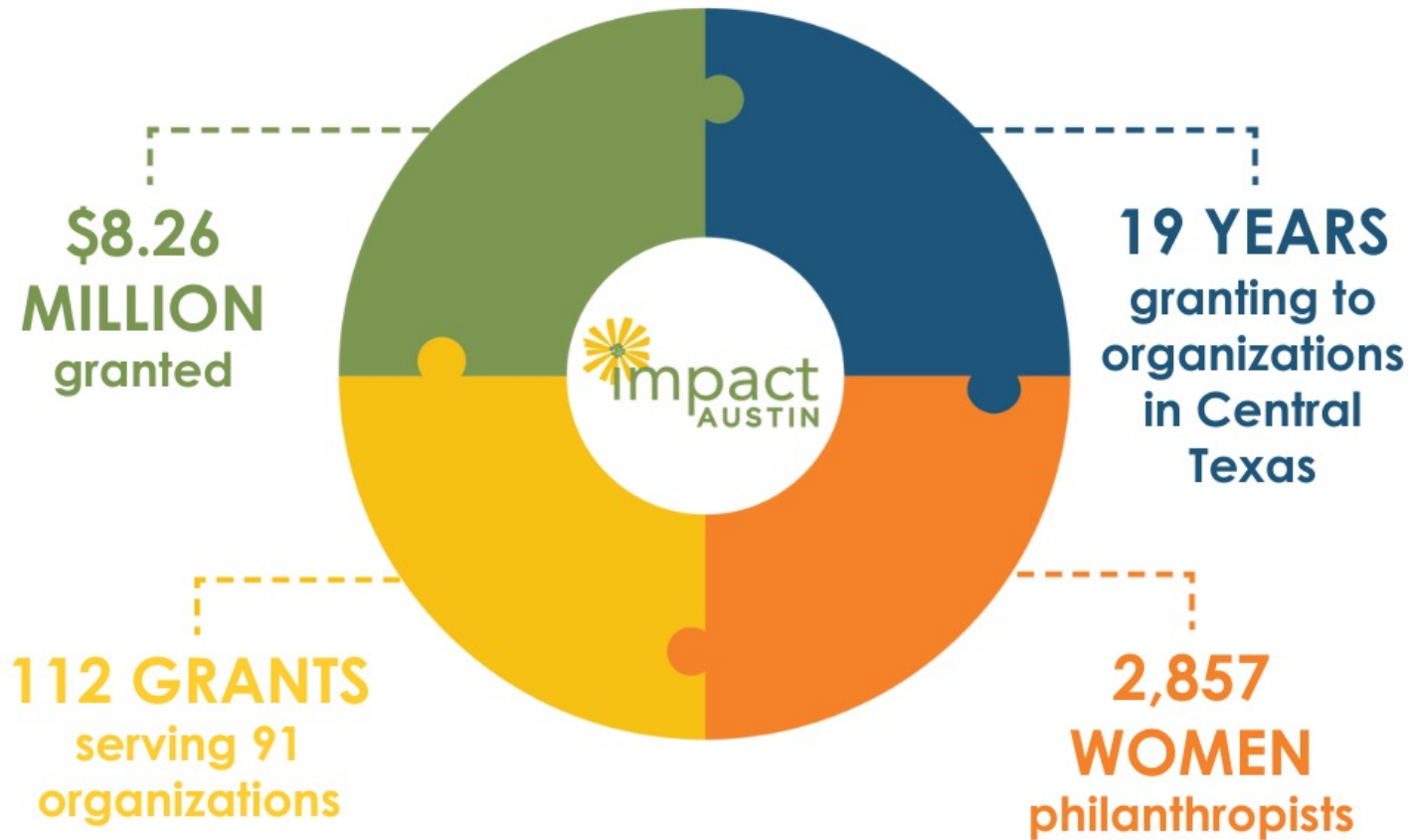   Kathleen Schneeman, Executive Director, Explore Austin

Impact Austin Overview

$8.26 MILLION granted

19 YEARS granting to organizations in Central Texas

112 GRANTS serving 91 organizations

2,857 WOMEN philanthropists

Welcome

Demetria George Caston
Executive Director
Impact Austin

Grants Overview

Melissa Lorber
Grant Review 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 made by single organizations or collaboratives
- Grant amounts will be based on membership levels and announced at the start of each grant cycle (January 13 for Spring Grants)
- 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

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 IRS 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 2023; Equity and Health & Well-Being for Fall 2023
  - 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

- Political lobbying or legislative activities

- General fund drives, annual appeals, or fundraising events

- Sports teams or competition

- General construction or renovation (unrelated to a specific proposed initiative)

- General capital campaigns (unrelated to a specific proposed initiative)

- Fraternal, sectarian, and religious organizations where the grant is intended to principally benefit of the organization's own members/adherents, or to fund inherently religious activities

- Private foundations

- Litigation/legal expenses incurred in actions by or against the organization

- Advertising

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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 2023
Education	Enhance education and learning	
Equity	Advance equity for women and/or girls of color	Nov 2023
Health & Well-Being	Strengthen and enhance the lives of children and families, or positively impact the mental or physical health and wellness of people	

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

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Review Committees

The 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.

Girls Giving Grants (g3)

- Girls Giving Grants (g3) is the youth version of Impact Austin. Each girl (in grades 8-12) gives $125 of her own money, with $100 of that amount allocated for the community grant. Girls are trained on many topics, including community needs and how to assess grants.

- Since 2006, g3 has awarded $107,200 in grant awards. The 2023 grant award will be $8400.

- The g3 grant cycle runs concurrent with the school year. The application window is open for the g3 grant during the month of October. The recipient of the g3 grant is selected in April.

- Grant funds support youth programs in Travis, Hays, Williamson and/or Bastrop counties.

- Nonprofits may apply for this grant in addition to, and separately from, the Impact Austin grant process.

- Information about the g3 Grant is available at impactaustin.org/apply-for-g3-grants.
- For questions about the g3 grant, contact g3@impactaustin.org.

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Fay Evans-Martin
Nonprofit Coordinator
Impact Austin

Grant Process Overview

Grant Application Process

Phase I: Grant Application

Phase II: Site Visit

Phase III: Presentation and Vote

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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, where and why are you doing it and how will you measure success.

The Grant Application asks about six topics:
- Organization
- Initiative Description
- Goals, Measurement and Evaluation
- Funding and Sustainability
- Equity
  - Diversity, Equity, Inclusion, and Belonging are important goals for Impact Austin. We want you to tell us how they are important for your organization too.
- Collaborators, if any

Required attachments include organizational financials, initiative budget, audit, Form 990, litigation, and collaborator commitments.

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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. Some site visits may be held virtually.

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 2023.

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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 5, 2023, to give you all the necessary information

  - 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 five-minute 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 5, 2023

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Key Grant Dates

Spring 2023 GRANTS

01/10/2023 - Impact Austin Spring 2023 Nonprofit Workshop

01/13/2023 - Grant applications open for submission; Grant amount announced

02/07/2023 - Grant applications close at 5:00PM CT

03/10/2023 - Initial grant review decisions communicated

04/07/2023 - Semifinalist decisions communicated

04/20 - 04/22/2023 - Site visits

05/04/2023 - Finalist decisions communicated; all other applicants declined by this date

05/05/2023 - Finalist training

05/17/2023 - Finalist reports distributed to Impact Austin members to begin voting

06/05/2023 - Impact Austin Annual Meeting; Community Partners announced

6/30/2023 - Spring grant awards issued

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Grant Management System

- Impact Austin will start accepting Applications for Spring 2023 Grants starting January 13

- 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: 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")
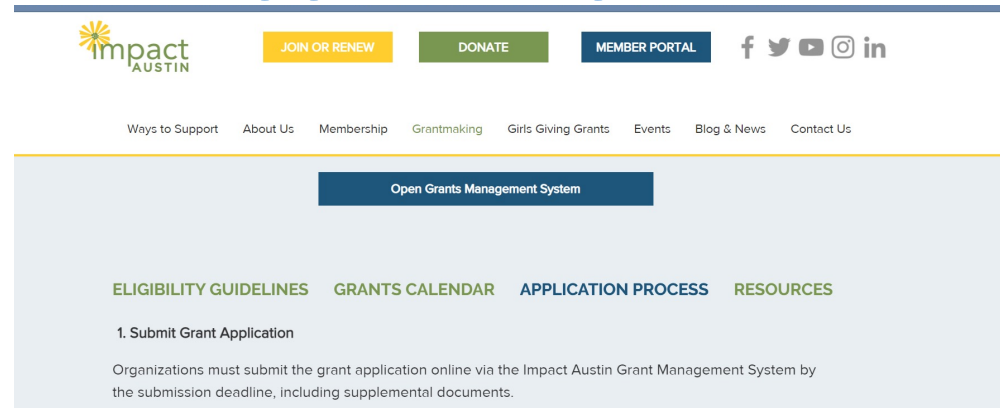
- Start applications early so we can assist with questions and issues!!

- If you have any questions, contact us at grants@impactaustin.org

Grant Management System

Sign In

Email

Password

Log In · Forgot your password?

Need an Account?

Sign Up

You will see two options

    1) Sign In

    2) Need an Account?

- Most of you will use the "Sign In" option—**<u>only</u>** 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 **<u>not</u>** 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 <u>grants@impactaustin.org</u>

- 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

- **<u>Only</u>** 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

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Lessons Learned

Lesson 1: It will take time to gather and upload all the requested supporting documents that need to be filed with the Grant application.

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

Lesson 3: 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 grants@impactaustin.org. (We can fix it!) Do **not** attempt to alter the EIN and proceed.

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

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Financial

Lauren Lewis
Grants Finance Coordinator
Impact Austin

Financial Requirements

- All required financials documents (see slides 25-27) must be submitted with the application

- Please double check your submission to be sure all required documents are included. Missing, incomplete, or incorrect financial documents may 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, or it is not applicable.

  - Submit before the last day so there is time for you to double check what you submitted.

- If your initiative is selected to move on to the site visit phase, you will be asked to provide proof of insurance.

- 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.

- You are answering the question, "How will our nonprofit spend this Impact Austin grant?"

- 20% of the grant amount is unrestricted and may be used for general and administrative or program expenses.

- You must use the Impact Austin form.

- Total expenses, including the 20% unrestricted amount, must equal the amount of the grant. Income less expenses must be zero.

Required Financial Documents

Organization Financials
- *Statement of Activities* (Income and Expenses) for the most recently completed fiscal year – no older than 14 months before the February 7 application deadline. (11/30/2021)
- *Statement of Financial Position* (Balance Sheet) for the most recently completed fiscal year - no older than 14 months before the February 7 application deadline) and most recent month-end- no older than 60 days before the February 7 application deadline (11/30/2022).
- *Current Year Organization Budget with Year-to-Date Actuals* – no older than 60 days before the February 7 application deadline (11/30/2022).
- You may use your own financial statement forms or the Impact Austin forms provided in the application.

Financial Narrative
- Explains any key items on the financials that would not be obvious to those outside the organization

Audit, financial review, or compilation

Form 990 (most recently filed)

Required Financial Documents

Funding Sources
- List of entities (e.g., Foundations, Corporations, Governmental agencies, etc.) funding your organization for the current year and most recently completed fiscal year.

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 who will receive a portion of the Impact Austin grant.

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Financial Requirements

- Key areas to review before submission of your application:

  - On the Initiative Budget, Revenue less Expenses must equal zero.

  - Budget term (in months up to 24) must match the number of months from Grant Start Date to Grant End Date.

  - FTEs associated with the Initiative should be included on the Initiative Budget.

- If you have questions about the financial documents, please contact grants@impactaustin.org.

Example

Impact Austin Grant Application Form

Initiative Budget

The Initiative Budget details the revenue and expenses for the proposal for which you seek the Impact Austin Grant.

Name of Organization: Example Nonprofit

Over how many months will the Impact Austin grant be expended? 9

This format is required. Use the **Initiative Budget section of the Financial Narrative attachment** *to explain budget numbers and assumptions.*

Revenue/Support		Impact Austin Grant	% Budget
Impact Austin grant		$ 60,000	100%
Total Revenue/Support		$ 60,000	100%

Expenses		Impact Austin Grant	% Budget
Unrestricted	**20% of IA Grant**	$ 12,000	20%
Payroll (including taxes and benefits)		$ 35,000	58%
Consultants & professional fees		$ 2,000	3%
Occupancy		$ 3,000	5%
Utilities, including phone		$ 1,500	3%
Insurance		$ 2,000	3%
Equipment		$ -	0%
Supplies		$ -	0%
Travel		$ -	0%
Staff development		$ 500	1%
Program Evaluation		$ -	0%
Other *(List & describe in Narrative*)*			0%
	Conferences	$ 2,000	3%
	Accounting	$ 2,000	3%
		$ -	0%
		$ -	0%
		$ -	0%
Total Expense		$ 60,000	100%
Difference (Revenue/Support less Expense)		$ -	0%

Note: The difference is zero →

Total Revenue/Support less Total Expense (Difference) must equal zero.

Full time equivalent staff on project at beginning of initiative budget period: 8
Full time equivalent staff on project at end of initiative budget period: 9

For Collaborative Initatives use the section below to show the Distribution of Impact Austin Funds across Collaborators.

Impact Austin Grant Amount   60,000

Organization Name	Grant Amount	Percent of Grant
	$ -	0%
	$ -	0%

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Sample Financial Statements

Initiative Budget EXAMPLE

Statement of Activities EXAMPLE

Statement of Financial Position EXAMPLE

Budget vs. YTD Actuals EXAMPLE

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

Kathleen Schneeman
CEO
Explore Austin

Q & A

Moderators:
Elaine Jensen, Impact Austin Non-Profit Coordinator
Fay Evans-Martin, Impact Austin Non-Profit Coordinator

Panelists:
Karen McLinden, Impact Austin Grants Co-Chair
Michelle Rankin, Impact Austin Grants Co-Chair
Lauren Lewis, Impact Austin Grants Finance Coordinator
Kathleen Schneeman, Executive Director, Explore Austin

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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