



WELCOME

to the

**2021 Impact Austin Nonprofit Workshop
Fall Grants**



Meeting Agenda

4:35 – 4:45

Welcome

Christina Gorczynski, Impact Austin Executive Director

4:45 – 5:10

Impact Austin Grant Process Overview

Melissa Lorber, Impact Austin Nonprofit Coordinator

Anne Helmick-Lyon, Impact Austin Nonprofit Coordinator

Margaret Ballinger, Impact Austin Grants Finance Committee

5:10 – 5:20

Grant Process Experience

Chelsea Elliott, Executive Director – half Helen Foundation

5:20 – 5:30

Q&A, Feedback

Marla Whelan, Impact Austin Grants Co-Chair

Margaret Ballinger, Impact Austin Grants Finance Committee

Chelsea Elliott, Executive Director – half Helen Foundation



Impact Austin Grants: Welcome

Welcome

Christina Gorczynski

Executive Director

Impact Austin



Impact Austin Grants: Changes in 2021

- Streamlined application and review processes - Spring and Fall grant cycles, 2 focus areas per cycle
- Proposals can support existing or expansion of initiatives, and by single organizations or collaboratives that:
 - Target a specific population
 - Last for a specific duration
 - Aim to achieve specific, measurable goals
- Proposals can also support capacity building
- Grant amounts will be based on membership levels and announced at the start of each grant cycle (July 8, 2021 for Fall 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
- More information can be found at:
<https://www.impactaustin.org/post/introducing-a-streamlined-grants-process>.



Impact Austin Grants: 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 - Health & Well Being and Equity for Fall 2021, Community and Education for Spring 2022
 - Organization must not have received an Impact Austin Grant within the time frames posted in the [Impact Austin Grant Application Guidelines](#)



Impact Austin Grants: 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



Impact Austin Grants: Grants Summary

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

Grant	Description	Award Date
Equity	Advance equity for women and/or girls of color	Nov 2021
Health & Well-Being	Strengthen and enhance the lives of children and families, or positively impact the mental or physical health and wellness of people	
Community	Enhance economic, social, environmental or cultural initiatives	June 2022
Education	Enhance education and learning	



Impact Austin Grants: Five Key Criteria Used to Evaluate

- **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; and 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



Impact Austin Grant Process: Definition of 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.



Impact Austin Grant Process: Overview

Grant Application Process

Phase I: Grant Application

Phase II: Site Visit

Phase III: Presentation and Vote



Impact Austin Grant Process

Phase 1: 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 has been streamlined. **We no longer require a Letter of Inquiry (LOI).** 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 later in this presentation.



Impact Austin Grant Process 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 Spring 2021 but may be in person for Fall 2021)
- 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 Town Hall for Fall 2021



Impact Austin Grant Process Phase III: Presentation and Vote

Planning is still underway for voting in the Fall. It could be done before or during the Town Hall. If you are selected as a finalist, there will be a Finalist Training session on October 22, 2021, to give you all the information necessary.

- The Finalist Packet is composed of the Finalist cover letter, Finalist Report, and Initiative Budget
- The Finalist Packet could also include a five-minute video if voting is completed before the Town Hall; if voting is completed at the Town Hall, you will be asked to give a five-minute presentation that evening
- The materials are prepared jointly by Grant Review Committee (GRC) Chairs and the nonprofit and are provided to the full Impact Austin membership
- The nonprofit with the most votes in each focus area will receive a grant for 80% of the funding; the nonprofit receiving the second most votes will receive a grant for 20% of the funding
- Members are notified during the Town Hall on November 16, 2021
- Press release issued the next morning



Impact Austin Grant Process: Key Grant Dates

FALL 2021 GRANTS

06/30/2021 - Impact Austin 2021 Nonprofit Workshop

07/08/2021 - Grant applications open for submission

08/03/2021 - Grant applications close at 5:00PM CT

09/02/2021 - Initial grant review decisions communicated

09/23/2021 - Semifinalist decisions communicated

10/07/2021-10/09/2021 - Site visits

10/21/2021 - Finalist decisions communicated; all other applicants declined by this date

10/22/2021 - Finalist training

11/03/2021 - Finalist reports distributed to members

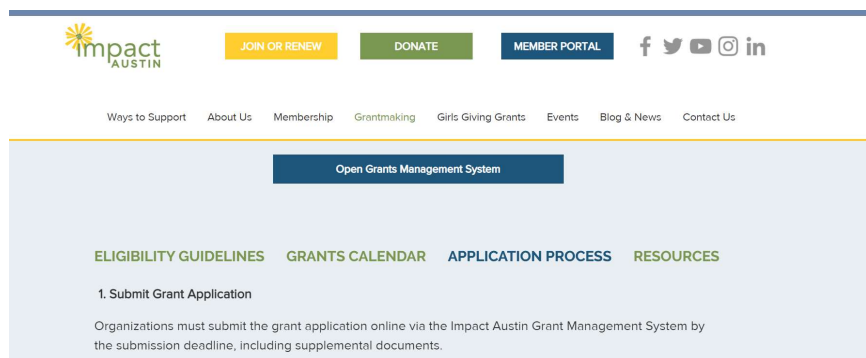
11/16/2021 - Impact Austin Town Hall Meeting; Community Partners announced

12/01/2021 - Fall grant awards issued



Impact Austin Grant Management System

- Impact Austin will start accepting Grant Applications for Fall 2021 Grants (Health & Well Being and Equity focus areas) starting July 8
- 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 & issues!!**
- If you have any questions, contact us at grants@impactaustin.org



Impact Austin 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—**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 would like to change) the email or password associated with your agency’s Profile, please 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.



Impact Austin: 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. (There is no longer an LOI phase—all supporting documents must now be filed with the initial application.)

Lesson 2: The word limits for the Fall Grants have been shortened from the Spring Grants cycle.

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 attempt to alter the EIN and proceed.

Lesson 4: 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.



Impact Austin Grants: Financial

Margaret Ballinger
Grants Finance Committee
Impact Austin



Impact Austin: Financial Requirements

- All required financials documents (see next slide) must be submitted by the due date. Late submissions will not be accepted. Please double check your submission to be sure all required documents are included. Missing required 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.
- Key areas to Review Prior to Submission:
 - On the Initiative Budget, Revenue less Expenses should equal zero, both for the Impact Austin and Other Funding.
 - 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.



Impact Austin: Required Financial Documents

- Initiative Budget
 - If the Initiative is for more than the IA funding, use the Other Funds column to detail the other funding
- 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
- Form 990 (most recently filed)
- Funding Sources
 - Listing of entities (e.g. Foundations, Corporations, Governmental agencies, etc) funding your organization for the current year and most recently completed fiscal year (side by side)



Impact Austin: 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 2 years, with a brief description of the basis for each
- Collaborators
 - Letter(s) of commitment from organizations collaborating on the Initiative



Girls Giving Grants (g3): Overview

- *Girls Giving Grants (g3)* is the youth version of Impact Austin. Each girl (in 8-12th grade) 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 \$98,000 in grant awards.
- For the 2021 grant cycle, g3 had 76 members, bringing the grant amount to \$7,600. Registration for the Class of 2021-2022 begins in the Fall, which determines the next grant amount.
- Grant funds must 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.
- The g3 process is very similar to the Impact Austin process, with the girls assessing grant documents on six criteria outlined in the grant application. Think about this audience when writing your grant and know that they are diligent in sticking to the criteria details.
- Applications for the g3 grant will be accepted starting on October 1 and due by November 5, 2021 for the 2021-2022 grant cycle. The recipient of the g3 grant will be selected in April 2022.
- Information about applying for a g3 Grant is available at impactaustin.org/apply-for-g3-grants. For questions about the g3 grant, contact g3@impactaustin.org.



Impact Austin: Community Partner

Community Partner Grant Experience

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

Chelsea Elliott
Executive Director
half Helen Foundation



Q&A

Moderators:

- Melissa Lorber, Impact Austin, Non-Profit Coordinator
- Anne Helmick-Lyon, Impact Austin, Non-Profit Coordinator

Panelists:

- Marla Whelan, Impact Austin, Grants Committee Co-Chair
- Margaret Ballinger, Impact Austin, Grants Finance Committee
- Chelsea Elliott, Executive Director – half Helen Foundation



Additional Resources and Thanks!

THANK YOU for attending our workshop!!

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