



Impact Austin 2022 Nonprofit Workshop Fall Grants

June 2022 | Impact Austin

Meeting Agenda

4:05 – 4:15

Welcome

Marla Whelan, Impact Austin Grants Co-Chair

4:15 – 5:00

Impact Austin Grant Process Overview

Melissa Lorber, Impact Austin Nonprofit Coordinator

Fay Evans-Martin, Impact Austin Nonprofit Coordinator

Margaret Ballinger, Impact Austin Grants Finance Coordinator

5:00 – 5:10

Grant Process Experience

Jason Gindele, Executive Director, Mainspring Schools

5:10 – 5:30

Q&A

Marla Whelan, Impact Austin Grants Co-Chair

Margaret Ballinger, Impact Austin Grants Finance Coordinator

Jason Gindele, Executive Director, Mainspring Schools



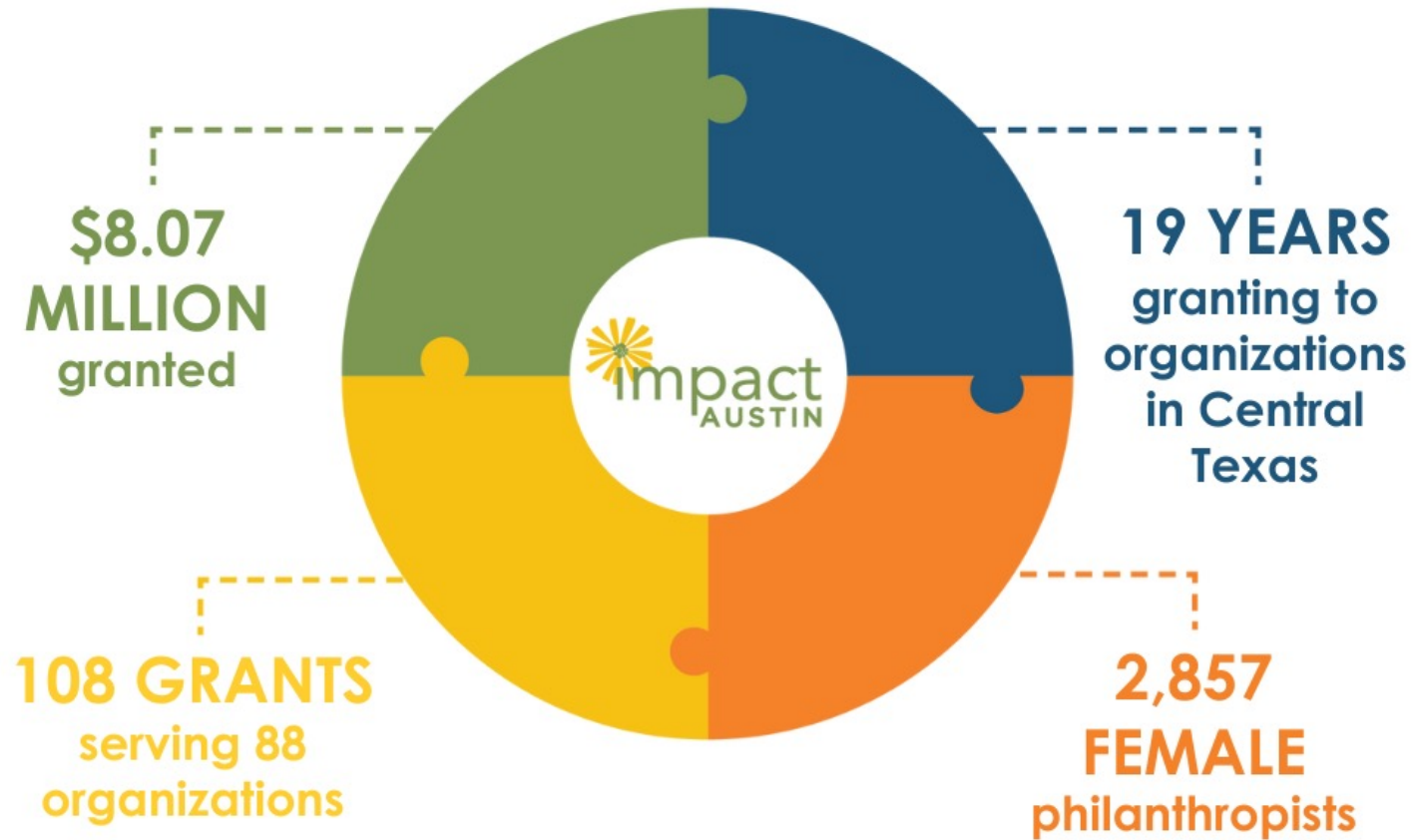
Welcome

Marla Whelan
Grants Co-Chair
Impact Austin



Impact Austin Overview

OUR COLLECTIVE IMPACT



Grants Overview

Melissa Lorber
Nonprofit 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 (July 8, 2022 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



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 2022; Community and Education for Spring 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
- 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
Equity	Advance equity for women and/or girls of color	Nov 2022
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 2023
Education	Enhance education and learning	

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

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.



Grant Process Overview

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

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
 - Diversity, Equity, Inclusion, and Belonging are important goals for Impact Austin. We want you to tell us they are important for your organization too.
- Collaborators

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



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 2022 but may be in person for Fall 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 Town Hall for Fall 2022



Phase III : Presentation and Vote

- Voting in the Fall may be done before or during the Town Hall
- If you are selected as a finalist, there will be a Finalist Training session on October 21, 2022, 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 Town Hall; if voting is completed at the Town Hall, 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 Town Hall on November 15, 2022



Key Grant Dates

FALL 2022 GRANTS

06/29/2022 - Impact Austin Fall 2022 Nonprofit Workshop

07/08/2022 - Grant applications open for submission; Grant amount announced

08/02/2022 - Grant applications close at 5:00PM CT

09/02/2022 - Initial grant review decisions communicated

09/23/2022 - Semifinalist decisions communicated

10/06 - 10/08/2022 - Site visits

10/21/2022 - Finalist decisions communicated; all other applicants declined by this date

10/21/2022 - Finalist training

11/02/2022 - Finalist reports distributed to Impact Austin members to begin voting

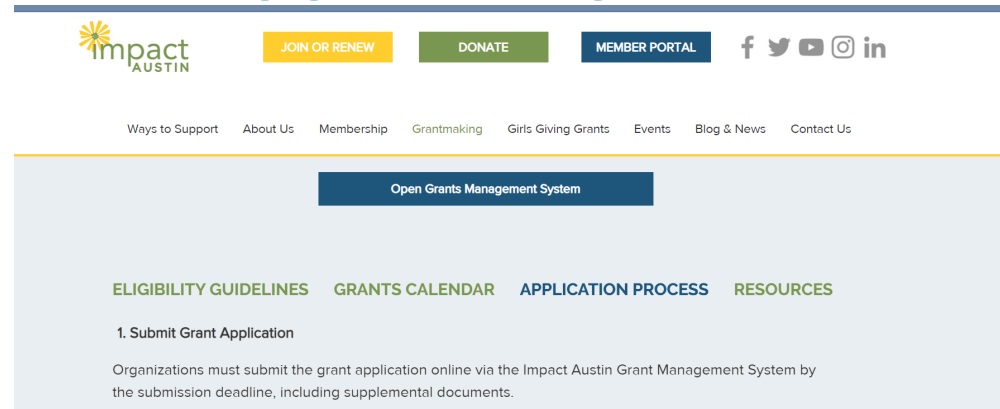
11/15/2022 - Impact Austin Town Hall; Community Partners announced

Nov 2022 - Fall grant awards issued



Grant Management System

- Impact Austin will start accepting Applications for Fall 2022 Grants 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 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—**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

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 of 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 representative from the organization is invited to participate on a Grant Review or other Impact Austin committee.



Margaret Ballinger
Grants Finance Coordinator
Impact Austin

Financial Requirements

- All required financials documents (see slides 23 - 26) 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, 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 or it is not applicable.
 - Recommendation is to submit before the last day so there is time for you to doublecheck 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.
 - 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
- 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

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 (in months up to 24) must match the term of the grant application
 - Total Initiative Budget should equal the amount you entered on the Proposal Cover Sheet
 - FTEs associated with the Initiative should be included on the Initiative Budget
 - In Kind Revenue must 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

Impact Austin Grant Application Form

Initiative Budget

Name of Organization:

How many months are included in this Initiative Budget?

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	Other Funds	Total Initiative	% Budget
Grants	\$ 75,500	\$ 20,000	\$ 95,500	76%
Contributions (including corporate matches)		\$ 30,000	\$ 30,000	24%
Program Revenue/Fees		\$ -	\$ -	0%
Membership dues		\$ -	\$ -	0%
Special events/fundraisers		\$ -	\$ -	0%
Investment income		\$ -	\$ -	0%
In-kind support (<i>List & describe in Narrative*</i>)		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Other (<i>List & describe in Narrative*</i>)		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Total Revenue/Support	\$ 75,500	\$ 50,000	\$ 125,500	100%

Expenses	Impact Austin Grant	Other Funds	Total Initiative	% Budget
Unrestricted 20% of IA Grant	\$ 15,100	\$ -	\$ 15,100	12%
Payroll (including taxes and benefits)	\$ 53,000	\$ 50,000	\$ 103,000	82%
Consultants & professional fees	\$ -	\$ -	\$ -	0%
Occupancy	\$ 1,000	\$ 1,700	\$ 2,700	2%
Utilities, including phone	\$ -	\$ 200	\$ 200	0%
Insurance	\$ 500	\$ -	\$ 500	0%
Equipment	\$ -	\$ -	\$ -	0%
Supplies	\$ 1,000	\$ -	\$ 1,000	1%
Travel	\$ -	\$ -	\$ -	0%
Staff development	\$ -	\$ -	\$ -	0%
Program Evaluation	\$ -	\$ -	\$ -	0%
In-kind expenses (<i>List & describe in Narrative*</i>)		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Other (<i>List & describe in Narrative*</i>)		\$ -	\$ -	0%
Accounting & Audit Ser	\$ 1,000	\$ -	\$ 1,000	1%
Marketing	\$ 2,000	\$ -	\$ 2,000	2%
	\$ -	\$ -	\$ -	0%
	\$ -	\$ -	\$ -	0%
	\$ -	\$ -	\$ -	0%
Total Expense	\$ 73,600	\$ 51,900	\$ 125,500	100%
Difference (Revenue/Support less Expense)	\$ 1,900	\$ (1,900)	\$ -	

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

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

1.5

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

2

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



Example 2

No expenses listed for
Impact Austin - Disqualified

Impact Austin Grant Application Form				
Initiative Budget				
Name of Organization:		No Expenses Nonprofit		
How many months are included in this Initiative Budget?		9		
This format is required. Use the <u>Initiative Budget section of the Financial Narrative attachment</u> to explain budget numbers and assumptions.				
Revenue/Support	Impact Austin Grant	Other Funds	Total Initiative	% Budget
Grants	\$ 75,500	\$ 50,000	\$ 125,500	100%
Contributions (including corporate matches)		\$ -	\$ -	0%
Program Revenue/Fees		\$ -	\$ -	0%
Membership dues		\$ -	\$ -	0%
Special events/fundraisers		\$ -	\$ -	0%
Investment income		\$ -	\$ -	0%
In-kind support (<i>List & describe in Narrative*</i>)			\$ -	0%
			\$ -	0%
			\$ -	0%
		\$ -	\$ -	0%
Other (<i>List & describe in Narrative*</i>)			\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Total Revenue/Support	\$ 75,500	\$ 50,000	\$ 125,500	100%
Expenses	Impact Austin Grant	Other Funds	Total Initiative	% Budget
Unrestricted 20% of IA Grant	\$ 15,100	\$ -	\$ 15,100	23%
Payroll (including taxes and benefits)	\$ -	\$ 25,000	\$ 25,000	38%
professional fees	\$ -	\$ -	\$ -	0%
Occupancy	\$ -	\$ 12,000	\$ 12,000	18%
Utilities, including phone	\$ -	\$ 2,000	\$ 2,000	3%
Insurance	\$ -	\$ 1,000	\$ 1,000	2%
Equipment	\$ -	\$ -	\$ -	0%
Supplies	\$ -	\$ 5,000	\$ 5,000	8%
Travel	\$ -	\$ -	\$ -	0%
Staff development	\$ -	\$ -	\$ -	0%
Program Evaluation	\$ -	\$ -	\$ -	0%
In-kind expenses (<i>List & describe in Narrative*</i>)			\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Other (<i>List & describe in Narrative*</i>)			\$ -	0%
		\$ 5,000	\$ 5,000	8%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Total Expense	\$ 15,100	\$ 50,000	\$ 65,100	100%
Difference (Revenue/Support less Expense)	\$ 60,400	\$ -	\$ 60,400	
Total Revenue/Support less Total Expense (Difference) must equal zero.				
# Full time equivalent staff on project at beginning of initiative budget period:		4		
# Full time equivalent staff on project at end of initiative budget period:		5		



Example 3

Impact Austin Grant Application Form

Initiative Budget

Name of Organization:

How many months are included in this Initiative Budget?

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	Other Funds	Total Initiative	% Budget
Grants	\$ 75,500	\$ 100,000	\$ 175,500	33%
Contributions (including corporate matches)		\$ 45,000	\$ 45,000	9%
Program Revenue/Fees		\$ 200,000	\$ 200,000	38%
Membership dues		\$ -	\$ -	0%
Special events/fundraisers		\$ 100,000	\$ 100,000	19%
Investment income		\$ -	\$ -	0%
In-kind support (<i>List & describe in Narrative*</i>)				
Goods given in-kind		\$ 2,000	\$ 2,000	0%
Volunteer Hours		\$ 3,000	\$ 3,000	1%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Other (<i>List & describe in Narrative*</i>)				
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Total Revenue/Support	\$ 75,500	\$ 450,000	\$ 525,500	100%

Expenses	Impact Austin Grant	Other Funds	Total Initiative	% Budget
Unrestricted <i>20% of IA Grant</i>	\$ 15,100	\$ -	\$ 15,100	3%
Payroll (including taxes and benefits)	\$ 35,000	\$ 330,000	\$ 365,000	69%
Consultants & professional fees	\$ 5,000	\$ 20,000	\$ 25,000	5%
Occupancy	\$ 5,000	\$ 25,000	\$ 30,000	6%
Utilities, including phone	\$ 2,200	\$ 8,000	\$ 10,200	2%
Insurance	\$ 3,000	\$ 7,000	\$ 10,000	2%
Equipment	\$ 200	\$ 30,000	\$ 30,200	6%
Supplies	\$ -	\$ 5,000	\$ 5,000	1%
Travel	\$ -	\$ -	\$ -	0%
Staff development	\$ 2,000	\$ 10,000	\$ 12,000	2%
Program Evaluation	\$ -	\$ 10,000	\$ 10,000	2%
In-kind expenses (<i>List & describe in Narrative*</i>)				
Goods given in-kind		\$ 2,000	\$ 2,000	0%
Volunteer Hours		\$ 3,000	\$ 3,000	1%
		\$ -	\$ -	0%
		\$ -	\$ -	0%
Other (<i>List & describe in Narrative*</i>)				
Conferences	\$ 5,000	\$ -	\$ 5,000	1%
Accounting	\$ 3,000	\$ -	\$ 3,000	1%
	\$ -	\$ -	\$ -	0%
	\$ -	\$ -	\$ -	0%
	\$ -	\$ -	\$ -	0%
Total Expense	\$ 75,500	\$ 450,000	\$ 525,500	100%
Difference (Revenue/Support less Expense)	\$ -	\$ -	\$ -	-

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

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

13

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

16

In Kind Revenue and In Kind Expenses match and;

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



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 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 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 the teens are diligent in sticking to the criteria details.

Information about the g3 Grant is available at impactaustin.org/apply-for-g3-grants.

For questions about the g3 grant, contact g3@impactaustin.org.



Community Partner

Community Partner Grant Experience

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

Jason Gindele
Executive Director
Mainspring Schools



Q & A

Moderators:

Melissa Lorber, Impact Austin Non-Profit Coordinator

Fay Evans-Martin, Impact Austin Non-Profit Coordinator

Panelists:

Marla Whelan, Impact Austin Grants Co-Chair

Margaret Ballinger, Impact Austin Grants Finance Coordinator

Jason Gindele, Executive Director, Mainspring Schools



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!