

2016
FMS Conference
Deland, FL

GRANTS

*EVERYTHING YOU NEED TO KNOW
(FROM A TO Z)*

SALLIE O'HARA, VILANO BEACH MAIN STREET / TARA HILL SPECIALTIES, LLC

ANNE HOLT, PHD, MONTICELLO MAIN STREET

Before & After

Grant Search and Preparation (30 min)	Grant Writing (30 min)
1. Assess organizational capacity (Leadership; Finance; Program/Project)	1. Perform extensive research
2. Align organizational missions to funder missions (Target populations; Geography; Community dynamics & relationships; Timing)	2. Suggest recommended solutions
3. Craft a work plan (Tools to use – calendars and online searches)	3. Create flexible text targeted to funders' goals
4. Target most probable funders (Local, State, Federal, Foundations – public & private)	4. Strictly follow grantor formats
5. Create templates; assemble standard documents (Budgets, program descriptions, organizational profiles; IRS letters; BODs; 990's)	5. State concise organizational goals/objectives
6. Marketing the message of success (Guidestar listings)	6. Detail applicant/staff accountability
	7. Follow-up with grantor for feedback if not selected
	8. Present proposals professionally neat and well organized
	9. Follow budget guidelines exactly (note overhead max)

LEARNING OBJECTIVES

- **Establish organizational readiness for targeted focused grants**
- **Establish a work plan for sustained acquisition and marketing**

HOW MUCH?



WHY?

TARGET SEARCHES

- **Local**
 - **Community Tourist Development Grants**
- **State**
 - **FL Humanities Council**
 - **Office of Greenways & Trails**
 - **CDBG**
 - **USDA Rural Development**
- **Federal**
 - **AmeriCorps**
- **Foundations**
 - **Private**
 - **Community Foundations**
- **Public Charities**
- **Sponsorships**
 - **TD Bank**
 - **FL Blue**
 - **CSX**



WORK PLAN

Grant Preparation Checklist Form ¶

(Use this form to gather needed documents for applying for funding.) ¶

Focus Areas for Funder Consideration ¶	Documents ¶	Descriptions ¶
Organizational Capacity ¶	Organizational Chart ¶ Board of Directors Listing ¶ Delegated Authority Letter ¶ Vision/mission ¶	Legal Name of Organization ¶ Board of Directors and Signing Authority ¶ Length of operations ¶
Overall Financial Status ¶	Total Agency Operating Budget ¶ 990 / Functional Expense Report (3yr history often requested) ¶ Audit ¶ FEIN # / DUNS # ¶ IRS Letter of Exemption ¶	Charitable Solicitation # helpful ¶
Vision/Mission/Goals/Objectives ¶	Strategic Plans ¶	Communication plans, marketing plans, work plans are helpful. ¶
Website / Social Media ¶	URL accounts ¶	¶
Program Description ¶	Narrative ¶	Scope of services within what program within the organization ¶
Performance Evaluation/Outcomes ¶	Program Metrics ¶	Include methods of data collection (process and outcome) - ¶
Target Population ¶	Annual Statistical Report Data ¶	Demographics of population served including location; age groups; other ¶
Program Budget ¶	Specific Annual Budget ¶	Must include narration of cost assumptions ¶
Need / Funding Gap ¶	Narrative ¶	A statement of need backed up by data strengthens the application. Identify the amount of funds needed and why need. -Must not be duplicative. ¶
Volunteers ¶	Reports of contributed hours ¶	Funders desire commitment of community and organizations to assure sustainability. Used as match oftentimes. ¶
Calendared Events ¶	Annual Calendar ¶	Funders like to have a snapshot of overall operations and investment in community. ¶

Templates

- Organizational Profile
 - Board of Directors
- Program Description
 - Goals / Objectives / Strategies
- Program Budget
 - Need identification
- Program Evaluation
 - Impact data

Project/Program Description Worksheet ¶

Date: _____ ¶

Project / Program / Event Title: _____ ¶

Lead Manager: _____ ¶

Project Description: + ¶

The Need: + ¶

Project Objective/Process: + ¶

Project Outcome: + ¶

Economic Impact ¶

Relationship to past projects / Alignment to mission: ¶

Budget Summary (list large categories) with specific line items included: ¶

→ Income: Grants, donors, products, + ¶

→ Expenses: Salaries w/fringe; Items of Cost: Advertising; Accounting; Travel; Conferences; + ¶

Total budget for this project is: \$ _____ ¶

Current Shortfall (Need request) \$ _____ ¶

Key words to use for research: ¶

1. What is the geographic focus of this project (if any)? + ¶

2. What areas of interest are we covering with this project? + ¶

3. What type of support do we need for this project? ¶

Tara Hill Specialties, LLC \project worksheet ¶

ONLINE SEARCH HELP

- GrantStation.com
- GrantHub.com
- Grants.gov
- Grantspace.org
- Foundationcenter.org
- Nccsweb.urban.org

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NCCS NATIONAL CENTER FOR CHARITABLE STATISTICS *The national clearinghouse of data on the nonprofit sector in the United States*

URBAN INSTITUTE

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Summary Views

Nonprofit	Charity Filers	Foundations	Social Capital	Congregations
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Private Foundations in Duval County, FL

Click on a foundation or organization's federal Employer ID Number (EIN) to learn more. Click on a column heading to sort on that column.

EIN	Name	Grants Given	Other Expenses	Total Assets	Fiscal Year
510431516	960 North Market Street Inc	275	17,684	581,692	2013
546030516	A D Williams 6 Tr Uw 302857 FBO Medical College of VA Tr Div	671,094	124,049	14,724,561	2014
546030515	A D Williams Art Rust Uw 05-500-6360606 FBO Medical College of Virginia	267,703	56,948	5,866,958	2014
546030690	A S Williams Trust Uw FBO 05 500 6365209 T C Williams Law School	293,470	59,265	6,438,121	2014
546338731	Abe Cohen Trust	248,022	61,665	6,041,927	2014
200007204	Acosta Rua Family Foundation Inc	62,529	3,122	56,483	2013
546030609	Ad Williams Trust FBO Sheltering Arms Hospital 34-055006363378 Sheltering Arms H	137,097	21,301	3,477,721	2014
546030578	Ad Williams Trust Uw FBO Richmond Eye Hospital	146,543	38,845	3,289,947	2014
546030581	Ad Williams Un Art 6 Tr Uw FBO University of Richmond	634,397	121,315	13,918,849	2014
596769738	ADA S Irving Trust Ua Dtd 061583 U S Trust Company of Florida	229,570	60,416	5,753,390	2013
570918209	Albertine Moore Scholarship Fund	1,995	3,756	57,107	2013
237410323	Alcoholic Rehab Inc	0	16,338	200,258	2013
591297267	Alfred I Dupont Foundation	1,781,630	308,739	42,560,535	2013
562620910	Alfred V Ernest Foundation Inc	48,500	61	1,600	2013
576029033	Alice F Clark Trust 4001047-2 C & National Bank of SC	21,670	9,905	577,646	2014
586103546	Allan C & Leila J Garden Foundation	175,625	76,921	5,269,407	2014
546371097	Alton Carlton and Martha C Elder Charitable Trust	14,508	5,526	374,834	2013
566039491	Alwinell Foundation of Charlotte	54,000	2,858	1,420,498	2014
546030438	American Lung Assoc U W Mlz 05 500 6366116	71,240	24,167	1,617,382	2014
261457559	Ann and Quinn Bell Foundation Incorporated	73,416	1,262	241,063	2013
306380443	Ann Degaito Pavone Tua	68,240	14,959	1,017,542	2014
326118085	Anne Mullen Orrell Charitable Tr	45,000	15,364	1,209,947	2013

GRANT STATION

- Fast method of search
- Build potential funder profiles
- Receive alerts for regional funding
- Limitation – local foundations
 - LOI – Letter of Interest
 - Develop personal relationship

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8/15/2016
• **Building a Stellar Grantseeking Team (NEV)**
8/15/2016
• **Now is the Time – Mobilize Your Board to Raise Funds**
8/20/16

Testimonials
"I recommended GrantStation to a new grant writer recently. I think GrantStation is the best value for the money. I like the fact that you have selected out foundations that don't accept applications. I also like the ability to look up Federal grants – much easier than Grants.gov! Thanks for providing a great product that we can actually afford."
Jo McManan
Grants Consultant
Jo.McManan@com

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NONPROFIT SECTOR

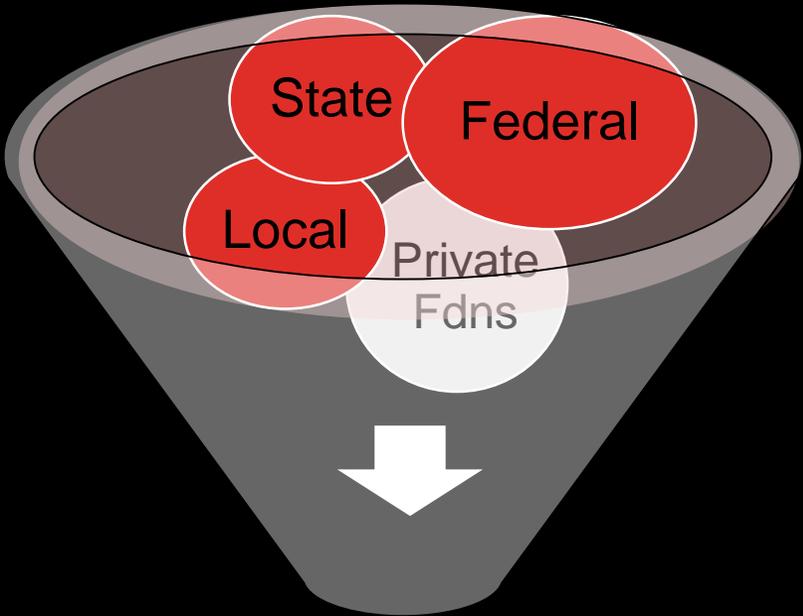
- **1.41 million nonprofits registered with IRS – 2013**
 - Includes public charities (3/4) AND private foundations
- **Contributed \$905.9 billion to the US Economy in 2013**
 - 5.4 percent of the country's gross domestic product (GDP)
- **Private giving from individuals, foundations and businesses totaled \$358.38 billion in 2014**
 - 5 percent increase over 2013
- **25.3 percent of US adults volunteered with an organization in 2014, contributing an estimated 8.7 billion hours = \$179 billion**

2012 – Florida had 70,642 nonprofits of which 57,860 were 501(c) 3 30 per 10,000 people

FUNDING FUNNEL



Return on Investment



Operational grants

Program grants

Grant Awards

Performance Contracts

Cost reimbursement / Advance payment awards

BUSINESS SPONSORS

- Corporate Foundations invest heavily to promote their causes
- Social philanthropic responsibility
- Online processes – simple



• Examples

- Community Foundation of NE FL
- Bank of America
- CSX
- Robert Redford Center
- Publix Supermarkets
- TD Bank
- Chic-fil-A
- Frontier Airlines
- Darden Restaurants
- Georgia Pacific
- Regions Bank
- Wells Fargo
- VyStar Credit

SAMPLE RANKING

- **Grantmaker**
- **Potential Funding**
- **Rating**
- **Start Date for Preparation**
- **Submission Date**
- **Notes – i.e. LOI**

Grantmaker	\$\$\$	Rating	Start Date	Submission Date	Other Dates to note
Rayonier Corporation	\$		29 July	Oct 31st	
BBVA Compass Foundation	\$\$\$		25 July	Sept 30th	
Bradson Library & Education Foundation	\$\$		25 Jan	Mar 15th	LOI
Rotary Foundation	\$\$		25 Jan	April	By invitation LOI
Wells Fargo	\$\$		25 January	April 15th	
CSX Community Investment Program	\$		24 Jan	Jan - Dec 15th	Apr Living to Serve Grant
SunTrust Foundation	\$\$		24 July	September 1st	
American Honda Foundation	\$\$		23 July / Dec	Feb. 1st & Aug. 1st	
Ball Foundation	\$\$		23 July / Jan	Mar. 4th & Aug 19th	
Boeing Company Corporate Contributions	\$\$		23 Feb 23-Apr 15	June 15th	LOI with logic model/invite By invitation after Concept
Community Foundation of NE FL	\$\$		23 December	April	
Petway Family Foundation, Inc	\$\$		22 none	all year	By invitation after LOI
Riverbranch Foundation	\$\$		22 Feb/Sept	May / November	By invitation after LOI
Target Foundation	\$\$		22 July	September 1st	Field Trips
THE PLAYERS Championship	\$\$		22 June	July 1st	
Bi-LO Foundation	\$\$		21 Rolling	all year	LOI - strictly local
Plum Creek Foundation/Weyerhaeuser	\$		21 Quarterly	October 31st Quarterly – Jan 1/Apr 1/ Aug 1 / Oct 1	
Darden Foundation	\$\$		20 Preceding qtr	any time	By invitation after LOL
Publix Foundation	\$\$		20 Quarterly	Quarterly rolling throughout the year	
Fifth Third Foundation	\$\$		19 Preceding qtr	all year	By invitation after LOI
Regions Charitable Giving Program	\$\$		18 none		
TD Charitable Foundation	\$\$		18 varies		Arboriculture Company Sponsor desired must have VIC card to apply
The Tree Research & Education Endowment Fund	\$\$		18 varies		
Northrup Grumman Foundation	\$\$		16 May	June 16th / Aug 31st	
Harris Teeter	\$\$		14 none	all year	
Walmart	\$		14 varies		

MASTER CALENDAR

1 st Quarter	2 nd Quarter	3 rd Quarter	4 th Quarter
Jan <i>Darden Restaurants</i> 1/1 <i>CSX Community Investment</i> 1/15 <i>Fl Parks & Rec</i> 1/15 <i>FL Humanities Council</i> 1/31	Apr <i>Rotary Foundation (LOI)</i> 4/1 <i>Darden Restaurants</i> 4/1 <i>Wells Fargo</i> 4/15 <i>NE FL Community Fdn (LOI)</i> 4/15	Jul <i>Player's Championship</i> 7/1	Oct <i>Darden Restaurants</i> 4/1 <i>Rayonier Corporation</i> 10/31
Feb <i>American Honda Fdn</i> 2/1 <i>VISIT FLORIDA</i> 2/15	May <i>Riverbranch Foundation (LOI)</i> 5/1	Aug <i>American Honda Fdn</i> 8/1 <i>Ball Foundation</i> 8/19 <i>Northrup Grumman Fdn</i> 8/31	Nov <i>Riverbranch Foundation (LOI)</i> 11/1
Mar <i>Ball Foundation</i> 3/4 <i>Bradson Library & Educational Fdn</i> 3/15 (LOI)	Jun <i>Northrup Grumman Fdn</i> 6/16	Sep <i>Sun Trust</i> 9/1 <i>BBVA Compass Foundation</i> 9/30	Dec <i>CSX Community Investment</i> 12/15

Grantor / Deadline

GRANT WRITING RESOURCES

Florida Resources

www.dos.state.fl.us/grants/index.cfm

Foundations

<http://Inp.fdncenter.org/finder.html>

<http://philanthropy.com>

U.S. Government

www.Grants.gov

www.hud.gov

www.ed.gov//fund/grant/apply/grantapps/index.html

<http://grants.nih.gov.gov/grants/oer.htm>

www.hhsa.gov/grants/default.htm

www.fns.usda.gov/fns/grants.htm

www.samhsa.gov/Grants/

www.dhhs.gov/grants

www.doleta.gov/grants/find_grants.cfm

www.epa.gov/smartgrowth/grants/index.htm

www.archives.gov/grants/

<http://sciencecareers.sciencemag.org/funding>

www.whitehouse.gov/omb/grants_default

THANK YOU

Sallie O'Hara, MSHRM

Vilano Beach Main Street, Inc.
www.vilanobeachfl.com

Tara Hill Specialties, LLC

(904) 540-0402
tarahill@bellsouth.net

Anne Holt, Ph.D.

Monticello Main Street, Inc.
www.monticellomainstreet.org

Anne Holt Consulting

(850) 576-0721
ahholt@ahholt.com

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