WELCOME
to the
2019 Impact Austin Nonprofit Workshop
Thank you to our facility host
Meeting Agenda

10:05 – 10:15  Welcome
Marla Whelan, Impact Austin Grants Co-Chair
Christina Gorczynski, Impact Austin Executive Director

10:15 – 10:50  Impact Austin Grant Process Overview
Katie Simoes, Impact Austin Nonprofit Support

10:50 – 11:05  Program Grant Process Experience
Simone Talma Flowers, Executive Director
*Interfaith Action of Central Texas*

11:05 – 11:30  Questions to Our Panel, Moderator Katie Simoes
Simone Talma Flowers, Interfaith Action of Central Texas
Marla Whelan, Impact Austin Grants Co-Chair
Teri Pensock, Impact Austin Finance Committee
Impact Austin Grants: Overview

Program Grants
- Impact Austin will award **three** program grants valued at $100,000 in each of three focus areas: Community, Education, Health & Well-being
- Provides funding for a specific program/project in the focus area that produces measurable results for clients

Catalyst Grant
- Impact Austin will award **one** catalyst grant valued at $100,000.
- Provides funding to strengthen or grow a Nonprofit to improve its performance, impact & sustainability
- Open to established non-profits

Social Innovation Grant – New!
- Impact Austin will award **one** SIG high-impact grant valued at $110,000 for a collaborative focused on advancing equity for women and girls of color in Central Texas

**g3**
- Girls Giving Grants, our youth version of Impact Austin, will award an $10,300 grant to a youth-oriented program.
IA Grants: General Eligibility Guidelines

• An **eligible organization** must:
  – Be a public charity (not a private foundation)
  – Have tax-exempt status under Section 501(c)(3) and 509(a) of the Internal Revenue Service Code

• **Program/Project must:**
  – Provide services in Bastrop, Hays, Travis, and/or Williamson counties, Texas
  – Use the full amount of Impact Austin’s grant within 24 months

• **Organization can only apply** for one Program or Catalyst in a given year and must not have received an Impact Austin Program, Catalyst or SIG Grant within the last two years

• **Collaborations** must establish one lead organization for submission
IA Grants: 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
- Advertising
- Sports Teams or any sports-related activity or competition

- General capital campaigns, general construction or renovation unrelated to a specific proposed project or program
- 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
**Girls Giving Grants (g3): Overview**

- *Girls Giving Grants (g3)* is the youth version of Impact Austin. Each girl gives $100 of her own money. Girls are trained on many topics including community needs and how to assess grants.

- This year g3 has 103 members making a record $10,300 grant.

- Grant funds must support youth program expenses 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 simpler and streamlined for girls in 8-12th grade to understand. Think about this audience when writing your grant.

- Find information about applying for a g3 Grant go to impactaustin.org/apply-for-g3-grants. For questions about the g3 grant, contact g3@impactaustin.org.

- Girls Giving Grants began accepting applications on October 1. Applications are due November 11 by 5 pm.
Impact Austin is piloting a new Social Innovation Grant (SIG) in the fall of 2019. Grant Amount: $110,000

This grant will fund a high-impact project/program for a collaborative focused on advancing equity for women and girls of color in Central Texas Grant

Definitions:
- Collaborative: A group of two or more entities, at least one of which is a 501(c)(3) organization, working together for a common goal. The collaboration can be:
  - A new or existing program or initiative of entities partnering together for a collective outcome; or
  - A formal coalition of organizations with established membership
- High Impact: Measurable outcomes as a result of specific actions, activities and/or solutions that tackle the root cause of a particular social problem or issue.
- Advancing equity for women and girls of color: Aimed at improving the quality of life and opportunities for non-white women and/or girls
Program Grants: Overview

- Three *Program Grants* with a value of $100,000 will be awarded to local nonprofits in each of these focus areas
  - **Community** – Focus on programs that benefit the Economic, Social, Environmental or Cultural enrichment
  - **Education** – Focus on programs that further the ability to Educate and/or Improve Education
  - **Health & Well-being** – Focus on programs that address:
    - Strengthening and enhancing the lives of Children and Families, or
    - Positively impacting the Mental or Physical Health and Wellness of people

- **Proposals can support existing programs, expansion of programs, or new programs that:**
  - Target a specific population
  - Last for a specific duration
  - Aim to achieve specific, measurable goals
Program Grants: Five Key Criteria Used to Evaluate Program Grants

- **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 with projects or programs

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

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

- **Significant** – *project* should be done; meets an important need within the community; works to resolve the issue addressed
Catalyst Grant: Overview

• A **Catalyst Grant** provides a $100,000 grant for up to two years for the purpose of strengthening or growing a nonprofit organization in order to improve its future performance, impact, and sustainability, all in support of its mission and vision.

• The Catalyst Grant is for established organizations that meet the following criteria (in addition to the General Eligibility Criteria- p5):
  - The organization has an annual operating budget $250,000 or greater.
  - The organization has at least two full time equivalent staff.
  - The organization has been in continuous operation as an independent entity for at least five years.
  - The organization can produce an CPA compilation, CPA review, or CPA unqualified audit prepared by a third-party CPA firm and dated within the last 24 months.

• Please ensure your organization meets all criteria before applying for a Catalyst grant
Catalyst Grant: Examples of Eligible Programs/Projects

• Mission, Vision, Strategic Planning and Organizational assessment

• Leadership development, Board development, Executive transition, and Restructuring

• Program Delivery and Evaluation

• Building Strategic Relationships and Partnerships

• Resource, Fund Development (not including fundraising activities) and Earned Revenue Development

• Internal Operations and Management including capital improvements
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 IA 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.
# IA Grant Process: Overview of Process

**Program Grant Application Process**

- **Phase I:** Letter of Inquiry (LOI)
- **Phase II:** Grant Application
- **Phase III:** Site Visit
- **Phase IV:** Presentation and Vote

**Catalyst Grant Application Process**

- **Phase I:** Grant Application
- **Phase II:** Site Visit
- **Phase III:** Presentation to Membership and Vote
IA Grant Process: Letter of Inquiry (LOI) – Program Grant Only

The LOI is the initial application submitted by a nonprofit. The applicant provides an overview of the proposed program. The Grant Review Committees evaluate the LOI’s using IA guidelines and the five key criteria and select a short list of applicants to proceed forward with the full Grant Application. *(Note the LOI phase does not apply to Catalyst Grants)*

The LOI must clearly answer the question:

- What are you doing?
- Where are you doing it?
- Who are you doing it for?
- When will you do it?
- Why are you doing it?
The Program Grant Application provides much more detail about the proposal. The Grant Review Committees analyze the Grant Applications, conduct research, review financials, and select semi-finalists for the site visits.

The Program Grant Application consists of three sections:

- **Summary**
  - Organization details, program/project snapshot, contact information

- **Narrative**
  - Responses to specific questions about the organization, the proposed program/project, goals and metrics, and financing

- **Attachments including:**
  - Financial information such as project budget, Org Financials, IRS form 990, Audit (if available), Org charts, funding sources, letters of commitment, and litigation (if applicable)
The **Catalyst Grant Application** is a detailed document about the organization and the catalyst initiative proposed. There are six sections:

**Administrative** – Organization details, contact information

**Catalyst request summary** – Summary of catalyst initiative, including any collaborations, how the need was identified, and why it is important to address the need now

**Catalyst Request** – detailed description of the catalyst initiative

**Goals, Measurement, and Evaluation** – The goals for the request, the objective criteria for success, how it will be known if the criteria have been met and if the benefits last beyond the award period

**Funding information** – Payment schedule, list of other funding and funders, and other support required to complete the initiative

**Attachments** – Financial information such as organization budget, initiative budget, statement of activities, balance sheets. Other information including organization chart and letters from collaborators.
IA Grant Process: Site Visit

- Three to four 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

- Purpose: To meet the people behind the organization and gain first-hand observations and impressions. Site visits last two hours

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

- Following the site visit each Grant Review Committee members will select 2 Finalists to present at the Annual Meeting
IA Grant Process: Presentation and Vote

Finalist Reports:

- Reports prepared jointly by Grant Review Committee (GRC) and Nonprofit and available to full Impact Austin membership.

- The GRC will help finalists prepare for their annual meeting presentation if desired by the finalist.

Annual Meeting & Vote:

- Informal Meet & Greet before the presentations

- 5-minute presentations by each of the finalists

- Members vote on grant recipients
  - Nonprofits notified that night by phone
  - Members notified in person during the meeting
  - Press release issued next morning

Award Presentation
# Grant Process: Key Grant Dates

## Impact Austin Grants Key Dates

<table>
<thead>
<tr>
<th>Event</th>
<th>g3</th>
<th>SIG</th>
<th>Program Grant</th>
<th>Catalyst Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grant Open</td>
<td>Oct 1</td>
<td>Aug 15</td>
<td>Nov 11</td>
<td>Nov 11</td>
</tr>
<tr>
<td>LOI Due</td>
<td></td>
<td></td>
<td>Dec 11</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td></td>
<td></td>
<td>Jan 31</td>
<td></td>
</tr>
<tr>
<td>Financials Due</td>
<td></td>
<td></td>
<td>Feb 14</td>
<td></td>
</tr>
<tr>
<td>Grant Due</td>
<td>Nov 8</td>
<td>Sept 16</td>
<td>Feb 21</td>
<td>Dec 11</td>
</tr>
<tr>
<td>Notification</td>
<td>Jan 12/ Mar 9</td>
<td>Sept 25</td>
<td>Mar 27</td>
<td>Feb 12/ Mar 27</td>
</tr>
<tr>
<td>Pitch Presentations</td>
<td></td>
<td></td>
<td>Oct 7-11</td>
<td></td>
</tr>
<tr>
<td>Notification</td>
<td></td>
<td></td>
<td>Oct 17</td>
<td></td>
</tr>
<tr>
<td>Site Visit</td>
<td>Apr 4</td>
<td></td>
<td>Apr 16-18</td>
<td>Apr 16-18</td>
</tr>
<tr>
<td>Notification</td>
<td></td>
<td></td>
<td>May 8</td>
<td>May 8</td>
</tr>
<tr>
<td>Finalist Luncheon</td>
<td></td>
<td></td>
<td>May 12</td>
<td>May 12</td>
</tr>
<tr>
<td>Finalist Reports due</td>
<td></td>
<td></td>
<td>May 22</td>
<td>May 22</td>
</tr>
<tr>
<td>Presentation/Vote</td>
<td>Apr 5</td>
<td>Nov 6</td>
<td>Jun 8</td>
<td>Jun 8</td>
</tr>
<tr>
<td>Community Partner Presentation</td>
<td></td>
<td></td>
<td>June 15</td>
<td>June 15</td>
</tr>
<tr>
<td>Grant Funding</td>
<td>Jul 1</td>
<td>Dec 1</td>
<td>Jul 1</td>
<td>Jul 1</td>
</tr>
</tbody>
</table>

(c) 2019 Impact Austin
Impact Austin has a new Grant Management System - Zengine. All grant proposals must be submitted using the Impact Austin Grant Management System.

Each grant type – Program, Catalyst, g3 - now has a unique login Portal.

If your organization already had an account and Agency Profile with Impact Austin:
- Your Agency Profile is in the new system.
- If you know your UserID use the Forget Password option to create a new password. All agencies are required to create a new password.

If you are new to Impact Austin or don’t have an Agency Profile:
- Create a new account and Agency Profile as part of the grant application process.
- If you try to create a new Agency Profile and the system gives you a duplicate EIN error this means your organization already has an Agency Profile.

If you have any issues with login, or need a new UserID, please contact us at grants@impactaustin.org.

Please do not create a new Agency Profile with an invalid EIN.

The new system will guide you through the grant application process.

Impact Austin will start accepting new grant applications for Program and Catalyst grants starting November 11. Go to ImpactAustin.org/apply to access the grant management system.
Common Problems with Grant Applications

• **Singular Agency Profile** – If you have applied for an Impact Austin Grant previously, you have an agency profile. If you do not know your agency UserID, or need to change it, email us at grants@impactaustin.org. Do not create a new agency profile.

• **Project Dates**
  – **Project Start and End Dates**: These are the project dates for your entire project. These dates may encompass a broader time frame that the time you are utilizing the Impact Austin grant.
  – **Grant Use Start Date**: This is the date your project plans to start using the Impact Austin grant. This date must be 7/1/2020 or later since that is the date the Impact Austin grant is received.
  – **Grant Use End Date**: This is the date when the Impact Austin grant is expended. This date must be within two years of the Grant Use Start Date.

• **Application Questions**: Please ensure you are answering the specific question asked. There is no need to repeat answers across multiple questions.

• **Financial Statements/Budgets**:
  – **Project Budget**:  
    o Project Budget must be greater than or equal to the IA grant amount, $100,000. If the project budget is greater than $100,000, please account for other funding sources.
    o Project Budget should only include the program being funded by IA. Do not include the entire organization budget.
  – **Financial Statements**: Financial Statements should balance 
    o **Budgets/Statements of Activities**: Revenue minus Expenses should equal zero.
    o **Statement of Financial Position**: Assets should equal Total Liabilities plus Net Assets.

• **501(c)(3) Status** – We verify that each submitting organization is a 501(c)(3) recognized by the IRS.

**Start Applications Early – so we can assist with questions & issues**
Community Partner Grant Experience

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

Simone Talma Flowers
Executive Director

Interfaith Action of Central Texas
Panel Discussion / Q&A

Moderator:

• Katie Simoes, Impact Austin

Panelists:

• Simone Talma Flowers, Executive Director, Interfaith Action of Central Texas
• Marla Whalen, Impact Austin, Grants Committee Co-Chair
• Teri Pensock, Impact Austin, Grants Finance Committee
THANK YOU for attending our workshop!!

A Special Thank You to Austin Ridge Bible Church!

If you would like to be emailed a copy of this presentation or if you have questions, please contact Sheryl Wright, Impact Austin Nonprofit Coordinator, at grants@impactaustin.org