WELCOME

to the
2019 Social Innovation Grant
Information Session
Meeting Agenda

10:00 – 10:10 Welcome and Impact Austin Overview
   Christina Gorczynski, Impact Austin Executive Director

10:10 – 10:40 Impact Austin Grant Overview and Process
   Michelle Rankin, Impact Austin Social Innovation Grant Chair

10:40 – 11:00 Questions and Answers
   Becky Austen, Impact Austin Grants and Strategic Partnerships
Impact Austin will fund a high-impact grant for a collaborative focused on advancing equity for women and girls of color in Central Texas

Grant Amount: $110,000

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.
Before you Apply

• Make sure you are an **eligible collaborative** and have an **eligible proposal**

• Review the SIG **Grant Guidelines**

• Understand the time required to submit an application and understand what will be required of you in each of the phases of the grant review process.
Eligibility Guidelines for SIG Grants

• Submitting 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
  - A collaborative or be a member of a collaborative

• Proposals can support existing programs, expansion of programs, or new programs that:
  - Advance equity for women and girls of color
  - Last for a specific duration
  - Aim to achieve specific, measurable goals

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

• Organizations who have been awarded an Impact Austin grant (program, catalyst or SIG) may not reapply for the following two years
  – This applies to the submitting organization only
  – You may be a non-submitting member of the collaborative during the two years

• Collaborations must have one lead organization which meets eligibility criteria
Overview of the SIG Application Process

- **Impact Austin has a three-phase SIG Grant Application process:**
  - Phase I: Written Grant Application
  - Phase II: Semi-Finalists Pitch Presentation
  - Phase III: Finalists Presentation and Vote
Phase I: Written Grant Application

The SIG Grant Review Committee analyzes the Grant Applications, conducts research, reviews financials, and selects semi-finalists for the Pitch Presentation.

The Grant Application consists of five sections:

- **Submitting Agency Profile**
  - Basic information about the submitting organization
- **Collaborative Profile**
  - Basic information about the collaborative
- **Proposal Summary**
  - Program/project snapshot
- **Proposal Narrative**
  - Responses to specific questions about the organization, the proposed program/project, goals and metrics, and financing
- **Attachments**
  - Financial information such as project budget, Org Financials, IRS form 990, Audit (if available), Org chart, funding sources, letters of commitment, and litigation (if applicable)
Grant Application Submission

• Application will be a Google Form with attachments
  – Link to application: https://forms.gle/PfHQn4BUHKV9FALS6

• Before you apply, make sure you are an eligible organization and have an eligible proposal by referring to our SIG Grant Guidelines.

• Tips:
  – Use the word version of the form to draft content offline, then cut and paste into the google form
  – Be as concise as possible, some of the fields in the online form have character limitations
  – Use templates and examples for attachments provided via google drive
  – You must name all attachments with the prefix of your organization name
  – Save the submitted form link. If needed, updates can be made by resubmitting the form prior to the deadline
Submitting Agency Profile

- Employer Identification Number*
- Name of your organization*
- Legal name (if different)
- IRS 501(c)(3) and 509(a) public charity status. **Must attach IRS status letter.**
- Year founded
- Website
- Mission statement
- Physical* and Mailing Address of your organization
- Organization Phone & Fax Number
- Executive Director name*, phone, email*
- Contact name* for this proposal, title, phone, email*

*indicates required fields
Collaborative Profile

- Name of Collaborative*
- EIN
- Established Date
- Website
- Mission
- Collaborative Contact Name*
- Contact Title
- Contact Phone
- Contact Email*
- **Collaborative Members** - list of member organizations

*indicates required fields
Application Summary

- Collaborative Agency Budget for Current Year*
- Collaborative Agency Budget End Date
- Initiative/Project Title*
- Initiative/Project Summary*
- Initiative/Project Budget*
- Initiative/Project Start Date*
- Initiative/Project End Date*
- Counties Served*  Travis, Hays, Williamson, Bastrop
- Additional Areas Served
- Certification
- Duration/Funding Schedule

*indicates required fields
Project Narrative

• Collaborative Organization
  – Describe the collaborative organization and its current programs and activities. Describe how racial and gender equity is a priority in your work and how you put that into practice. (Word Limit 500)*

• Proven Record of Success
  – Provide relevant details and examples of the impact you have had in the Greater Austin area advancing equity for women and girls of color. (Word limit 200)*

• Initiative/Project
  – Describe the project you want to fund in detail. Please include WHO your initiative/project will serve, WHY it is important, HOW you identified this need and WHY NOW is the right time. Include major milestones for the project with dates and key dependencies. (Word limit 500)*

• Goals, Measurement & Evaluation
  – Describe the results you expect to achieve, the outcomes for women and girls of color, and how you will measure success. (Word limit 500)*

• Funding & Sustainability
  – Describe plans for sustainability after the Impact Austin funds are expended. If applicable, list other sources of income (e.g., earned revenue, in-kind support) and other funders to which this proposal has been or will be submitted, the amount requested from them and whether the request is pending, funded or declined. (Word Limit 300)*

All fields Required
• A1. Project Budget* (Format: XLSX)
  – Using Impact Austin’s template, submit your detailed budget for the **proposed collaborative project/program**. Include a breakdown of how the funds will be distributed across the contributing members of the collaborative. **Name this file YOUR_ORG Project Budget.**

• A2. Organization Financials* (Format: XLSX or PDF)
  – Please provide a Statement of Activities and a Statement of Financial Position for the most recently completed fiscal year and your Current Year Organization Budget with YTD Actuals for the **submitting fiscal agent**. You may elect to submit this information in the format in which your organization typically produces for internal review OR you may choose to use the Impact Austin Organization Financials Template (Format XLSX). All three statements should be in one file. It can be a PDF or an Excel workbook with 3 worksheets.
  – Template and example provided

• A3. Financial Narrative* (Format: PDF or DOCX)
  – Using the Impact Austin template, please provide any supplemental description to explain information provided on your Project Budget and/or Organizational Financials. **Name this file YOUR_ORG Financial Narrative.**

• A4. Audit* (Format: PDF or DOCX)
  – Provide your most recent complete audit for **submitting fiscal agent**, if available, including auditor’s notes and management letter. If no audit is available, please provide a document that explains why. **Name this file YOUR_ORG Audit.**

*indicates required fields
Attachments Continued

- **A5. Form 990** (Format: PDF)
  - Provide your most recent Form 990 for submitting fiscal agent. Name this file YOUR_ORG Form 990. 20% of the budget must be used for operations.

- **A6. Collaborative Organization Chart** (Format: PDF)
  - Provide a current organizational chart for the collaborative showing names and position. Name this file YOUR_ORG Staff.

- **A7. Insurance** (Format: PDF)
  - Provide a copy of your certificate of insurance for submitting fiscal agent, evidencing your organization's lines and limits of liability insurance coverage. Name this file YOUR_ORG Insurance.

- **A8. Litigation** (Format: PDF, DOCX)
  - Provide a list of all actual (within the past 2 years) or threatened litigation or regulatory proceedings, investigations, or governmental actions in the last 2 years involving any organizations contributing to the collaborative, with a brief description of the basis for each. If there is no applicable litigation, please provide a statement to this effect. Name this file YOUR_ORG Litigation.

- **A9. Commitments** (Format: PDF)
  - Provide letters of commitment/agreement from organizations collaborating on this project or program, if appropriate. Name the file YOUR_ORG Collaboration Support.

*indicates required fields
Common Problems with Grant Applications

• Project Dates:
  – **Start Date**: If awarded, IA funds are not available until 12/1/2019. If a project starts before this date please explain how the project will be funded before IA funds will be received.
  – **Completion Date**: IA funds must be used by 12/1/21.

• 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 The Project Budget must be greater than or equal to the IA grant amount. The project budget cannot be less than the IA grant amount. If the project budget is greater than the IA grant amount, please account for other funding sources.
    o The Project Budget should only include the program being partially or wholly 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.

• Commitment Letters: If a project has funding from a collaborator there must be a commitment letter from the collaborator attached to the grant application. For example, if AISD is helping fund or staff the project, there must be a commitment letter from AISD.
Seven Key Criteria Used to Evaluate Grants

- **Collaboration** – *collaborative* with clearly defined roles and responsibilities for each entity and will incorporate a healthy mix of different entity types
- **Impact** – *project* advances equity for women and/or girls of color
- **Credible** – *collaborative* and contributing members are reliable and trustworthy; strong record of achieving their goals; have a solid reputation within the community
- **Capable** – *collaborative* can turn good ideas into reality; has competent and qualified staff, as well as the structure and systems to achieve its goals; prior success with projects or programs
- **Committed** – *collaborative* and contributing members consider the project to be a priority, has plan 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
Phase II: Semi-Finalists Pitch Presentation

- 3-5 organizations are selected for the Semi-finalists Pitch Presentation

- Applicants that are selected for the pitch presentations will be given an education session

- Purpose: To meet the people behind the organization and gain first-hand observations and impressions
  - Introductions
  - Collaborative/project overview
  - Q&A

- Following the pitch presentations the Grant Review Committee members will select 2 Finalists to present at the Town Hall Meeting on Nov 6 or 7. Hold both days.
Phase III: Presentation and Vote

Finalist Reports:

- Reports prepared jointly by SIG Review Committee and Nonprofit and available to full Impact Austin membership.

- The SIG Review Committee will help finalists prepare for their Town Hall meeting presentation

Impact Austin Town Hall Meeting & Vote:

- 5-minute presentations by each of the finalists

- Members vote on grant recipients
  - Nonprofits notified that night at the meeting
  - Members notified in person during the meeting

- Grant Award Presentation will be done at the Town Hall meeting
Social Innovation Grant Key Dates

Grant Application, Phase I
- August 15: Grants applications open
- September 16: Grant application submissions due at 5PM
- September 25: Semi-finalist decisions communicated

Semi-Finalist Pitch Presentation, Phase II
- September 27: Pitch presentation training
- October 7-11: Pitch presentations
- October 17: Finalist decisions communicated

Presentation and Vote, Phase III
- October 29: Finalist reports due
- November 6 or 7: Town hall presentations, vote, and award presentation. Please hold both

Grant Schedule
- December 1, 2019: Grant Start, 1st payment
- December 1, 2020: Grant 2nd payment
- December 1, 2021: Grant Completion

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• Download a copy of this presentation & Social Innovation Grant Guidelines from Apply for Grant page:
  – https://www.impactaustin.org/apply

• Download word version of the application for offline prep/drafting application:
  – https://drive.google.com/open?id=1ZGxrfQOrQOF3ETkyIpysvF-n1ihr5Se8

• Begin the Social Innovation Grant application:
  – https://forms.gle/PfHQn4BUHKV9FALS6
Questions & Answers

Becky Austen, Impact Austin Grants and Strategic Partnerships
Christina Gorczynski, Impact Austin Executive Director
Michelle Rankin, Impact Austin Social Innovation Grant Chair