AGENDA

Funding Sources
Writing a Great Proposal
Budget & After Submission
Q&A
BREAKDOWN OF FUNDING SOURCES

Foundations

Individuals – 80%

Public Funding

• Federal
• State
• Local

Business/Corporate
PLANNING FOR SUSTAINABLE FUNDING

• Diversify funding sources
• Build relationships
• Assume a low percentage of success in the beginning
• Rolling cultivation – always be planning for your next request
FINDING FUNDING SOURCES

- Wyoming Nonprofit Network
- Foundation Center (Candid)
- Annual reports of similar organizations
- Current funders
- National funding news for trends
- Industry news
- Teton County Library – Grant Resources
COMMUNITY FOUNDATION GRANTS

1. Designated
2. Donor Advised
3. Old Bill’s Fun Run
4. Discretionary Grant Programs
   a) Competitive Grants
   b) Micro Grants
   c) Youth Philanthropy
COMMUNITY FOUNDATION OF JACKSON HOLE GRANTS BY TYPE | 2019

- Donor Designated: 45%
- Donor Advised: 41%
- Old Bill's/Tin Cup: 6%
- Discretionary Grants/Scholarships: 7%
• Competitive Grants Committee: Volunteers in the community with diverse experience review applications & recommend grant awards.

• Field of Interest Subcommittees: Animals, Conservation & Environment; Arts & Culture; Education & Recreation; Health & Human Services

• Phone Calls / Grant Presentations
BASICS OF THE APPLICATION

• PROJECT SUMMARY
• COMMUNITY NEED
• PROJECT DESCRIPTION
• BUDGET
• EVALUATION
PROJECT SUMMARY

Your Proposal in a Nutshell

• Write it last or revisit at the end

• Must stand on its own so make it:
  • COMPELLING
  • CONCISE
  • FLOW

Most viewed – This is the Cliff Notes
Our community has a problem.
Our organization requests money to fix the problem.
We will fix the problem by doing certain things.
When we’re done, the problem will be minimized.

Why are you doing what you’re doing?

How will you do it?

What will happen if/when you do?
COMMUNITY NEED

NEED What’s the problem?
- Should be a community problem
- Connected to your mission
- Quantified and qualified

Make it about more than your organization.
COMMUNITY NEED

What problem do you propose to alleviate?
How do you know it is a problem?
What are indicators?
How have you assessed it?
How widespread is it?
How severe is it?
How long has it existed?
What else is being done to address the need?
Should this need be addressed?
COMMUNITY NEED

What methods can you use to document need?

*Both scientific and non-scientific tools are appropriate.*

Needs Assessments
Demographic Information
Observations
Anecdotal Information
Official Data (Police, Schools)
National/Local Statistics
Current Research/Literature
Compass Magazine

Surveys
Community Profile
Changes over Time
Comparisons
Info from Other Orgs
Online Resources
Interviews
School District
COMMUNITY NEED

Common Pitfalls:

• Focuses on organizational need or activities, not community need
• Issue not explained – understanding of broader context not demonstrated
• Not connecting with or understanding what other nonprofits are doing
• Applicable statistics
PROJECT DESCRIPTION

NEED What’s the problem?
- Should be a community problem
- Connected to your mission
- Quantified and qualified

PROJECT What are you going to do about it?
PROJECT DESCRIPTION

• Clearly describe how funds will be spent
• Concise
• Clear timing, logical sequence
• Consistent language
EVALUATION OR HOW WILL YOU KNOW IF YOU SUCCEEDED?

NEED
- What’s the problem?

PROJECT
- What are you going to do about it?

(relates to need)

BUDGET
- How much will it cost?

(relates to program)

EVALUATION
- Were you successful?
- Realistic and concrete
- Relate back to need
- Integrated
EVALUATION, OUTCOMES & REPORTING

• Go back to application
• Use the tools you said you would use
• Report against stated goals
• Share other findings
• Statistical and anecdotal information
EVALUATION, OUTCOMES & REPORTING

What if your program didn’t work?

• Don’t hide it!

• Great learning tools, for you and for the funder.

• Why didn’t it work?

• What would you do differently next time?

• Successful program vs. successful grant.
BUDGET

NEED
What’s the problem?

PROJECT
What will you do about it?

BUDGET
How much will it cost?
- Clear and reasonable
- Consistent with program
- Comprehensive and accurate
BUDGET ESSENTIALS

• Clear and understandable
• Diversity of revenue sources
• Potential for leverage
• Percentage of operating budget
• Consistent with project narrative
• Comprehensive – all revenue and expenses

• Reasonable estimates
• Net to zero
• Mathematically accurate
# SAMPLE BUDGET

<table>
<thead>
<tr>
<th>Income</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Foundation grant request</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Private foundation matching grant (pending)</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Individual donations</td>
<td>$400.00</td>
</tr>
<tr>
<td>In-kind contributed supplies (secured)</td>
<td>$100.00</td>
</tr>
<tr>
<td>Class fees (10 classes, 20 students, $20 / student)</td>
<td>$4,000.00</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td><strong>$8,500.00</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Expenses</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor comp &amp; benefits (10 classes @ 4 hours @ $35/hour)</td>
<td>$1,400.00</td>
</tr>
<tr>
<td>Class supplies &amp; occupancy ($510 / class)</td>
<td>$5,100.00</td>
</tr>
<tr>
<td>Program administration (15 hours @ $50 / hour)</td>
<td>$750.00</td>
</tr>
<tr>
<td>Advertising</td>
<td>$250.00</td>
</tr>
<tr>
<td>Scholarships (10 classes, 5 students, $20 / student)</td>
<td>$1,000.00</td>
</tr>
<tr>
<td><strong>Total Expense</strong></td>
<td><strong>$8,500.00</strong></td>
</tr>
</tbody>
</table>

| Net                                                                  | $0.00    |
SUPPORTING FINANCIAL INFORMATION

Most recent year-end or full year of activities

• Statement of Financial Position (Balance Sheet)
• Statement of Activities (Income Statement)

Current year (most recently approved)

• Operating Budget or Budget-to-Actual
SUCCESSFUL APPLICATION TIPS

• Logical Flow
• Clear, Concise, Compelling
• Passionate, but not emotional
• Realistic
• Budget fits
• Bang for Buck
• Follows guidelines
• Remember your funder and *their* goals
• We only know what you tell us!
GRANT PRESENTATION TIPS

• Who should attend?
• Frequently asked questions
• Know your proposal
• Bring someone who knows your budget, facts, figures and estimates for line items.
• Demonstrate enthusiasm
• Share additional information
• Bring visual aids, where appropriate
WHAT HAPPENS NEXT?

If you ARE funded …

• Read funder’s comments, if any
• Heed any rules about acknowledgement
• Run a good project
• Check with the funder on program changes
• Inform if budget deviates
• Communicate with the funder
• Submit your follow-up report on time
• Opportunity to tell story
WHAT HAPPENS NEXT?

If you are NOT funded …

• Read funder’s comments, if any

• Walk a mile….then think about reapplying

• Go back through the process: where might you have fallen short?

• Possible funder simply ran out of money

• Strengthen your proposal, see if another funder would be a better fit, and resubmit!
TELL US ABOUT YOUR PROJECT!

• The Foundation will contact you about specific dates of programs to share with our Grants Committee.

• Share photos and videos of projects and programs. We will post them on social media and share them with the community!
COMPETITIVE GRANTS DEMAND

<table>
<thead>
<tr>
<th>Year</th>
<th>Requested</th>
<th>Granted</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018</td>
<td>$800,000</td>
<td>$400,000</td>
</tr>
<tr>
<td>2019</td>
<td>$1,000,000</td>
<td>$600,000</td>
</tr>
<tr>
<td>2020</td>
<td>$1,200,000</td>
<td>$800,000</td>
</tr>
</tbody>
</table>
DON’T FORGET ABOUT:

Youth Philanthropy Grants: Apply in December

&

Micro Grants: Rolling acceptance of grant requests up to $3,000
WHAT ELSE / GENERAL QUESTIONS

• Can we submit more than one application to the Community Foundation in any year or cycle?
• Can I resubmit a declined proposal?
• What happens if you don’t spend all the money?
• Can I submit a grant to more than one funder at a time?
• We have applied for other funding for this project, do I list that in my proposal and if so, where?
• How will the Community Foundation make my proposal available to others and when?
Grant Writing Workshop

Evaluations

Thank you!