



# San Antonio Area Foundation

Where Giving and Community Connect

...helping donors achieve their charitable goals for the greater benefit of the community

**Wifi Userid: Saafdn Guest**

**Password: Area303Foundation!**



# Agenda

- Welcome and Introductions
- Overview of the Annual Responsive Grants
- Funding Priorities
- 2018 Cycle 2 Timeline
- Writing a Compelling Grant Application
- Open Discussion and Closing

# Ways the Area Foundation Can Help YOU

- Meeting Rooms
- Nonprofit Membership Program
- The Reggie Williams Resource Library
- Nonprofit Training and Certification Programs
- Strengthening Nonprofits Grants
- Agency Investment and Endowment Funds



# Discretionary Funding Opportunities

## 2018

- Annual Responsive (*application available now with a deadline of 7/20/18 at 11:59 pm*)
- Seniors - SALSA (Successfully Aging and Living in San Antonio) (*application available 8/20/18 with a deadline of 9/21/18 at 11:59 pm*)
- Biomedical Research (*application available 10/29/18 with a deadline of 12/3/18 at 11:59 pm*)
- Disaster Relief (*applications are accepted and reviewed when there is a declared disaster*)
- Special and Urgent Needs (*application available any time – there is no deadline*)
- Strengthening Nonprofits (*TBD*)

# Resource Information Lunches for 2018

Following are the dates scheduled:

- September 13
- December 6

# Analysis of 2017 Annual Responsive Grants

	Total amount requested	Total amount awarded	Number of grants awarded	Average grant amount
<b>Cycle One:</b>				
Children and Youth	\$2,671,294	\$525,694	23	\$22,860
Medicine and Healthcare	\$2,022,274	\$519,359	14	\$37,100
<b>Cycle Two:</b>				
Animal Services	\$978,558	\$500,638	16	\$31,290
Arts and Culture	\$2,207,791	\$735,317	24	\$30,640
Community-at-Large	\$2,710,727	\$499,458	19	\$26,290
<b>Total</b>	<b>\$10,590,644</b>	<b>\$2,780,466</b>	<b>96</b>	

# Application Process

- Deadline for Annual Responsive Grant Application
- Creating an Account
- Submitting an Application

# 2018 Cycle 2 - Deadlines and Additional Information

- June 11, 2018** → Annual Response Application available on website
- June 18<sup>th</sup> - July 18<sup>th</sup>** → Meet with applicants to discuss the Annual Responsive Application process
- July 20<sup>th</sup>** → **Grant application deadline at 11:59p.m.**
- Mid-September** → Email Notification Letters to ED's notifying them of the status of their Application
- September - November** → Site Visits
- Late-November** → Email letters informing of awards or regrets
- Mid-December** → Contracts and checks mailed to recipients



# Review Process

- Round 1 – Staff and Committee Chair
  - Staff reviews, scores and recommends
  - Committee Chair reviews and approves
- Round 2 – Full Committee
  - Reviews
  - Participates in site visits (*as available*)
  - Scores
  - Meets to discuss applications and determine funding

# SAMPLE of Scoring Tool

Please score each category from 1-5 using full range of scores. Highest score per application = 40

Please keep in mind that a score of 1 or 2 indicates a deficient response, a score of 3 indicates a strong response and a score of 4 or 5 can be used for exceptional responses.

Organization/Title of Program	Requested Amount	Strength of Organization (#1, mission, board/staff list)	Program's benefit to community/ relationship to mission (#2, #4, #5, #6, #7, #8, & #10)	Alignment with funding priorities (#3, #9)	Organization's ability to complete & evaluate program (#5, #6, #11, #12 & program budget)	Soundness of program budget (#5, #6, & program budget)	Relationship to the field (#13)	Organization's financial strength (program budget, financial summary, audit or balance sheet & income and expenses)	Overall strength of appl.	Rating
Agency ABC Mentoring Program	\$30,9793	4	4	3	2	2	4	4	4	28
Agency DEF Helping Those in Need	\$34,000	4	3	3	3	4	4	4	4	29
Agency GHI Operating Expenses	\$8,500	3	3	3	3	3	3	3	3	24
Agency JKL Playground Renovation	\$50,000	2	2	3	2	1	3	1	2	16
Agency MNO Senior's Program	\$15,000	5	5	4	4	5	4	4	4	35
Agency PQR: Back to School Program	\$15,000	4	4	4	4	4	4	4	4	32

# Site Visits Are ...

- Conducted on a three year cycle or with a change in leadership
- Helpful in understanding the organization and program
- An opportunity for Area Foundation staff and volunteers to get a clearer sense of the work of your organization
- A time to ask questions of each other



# What We Do Not Fund

- Endowments
- Debt reduction
- Operating deficits
- Indirect costs (*costs that are not directly associated with program/project*)
- Scholarships for colleges and universities (through this process)
- Funds to individuals
- First 75% of capital campaign goals (through this process)
- Political activities, organizations, or lobbying efforts intended to influence legislation

# Compelling Grant Applications

- The Essentials
- Narrative Questions
- Financials
- Q & A

# The Essentials

- Make sure your program is a fit with our funding priorities
- Be clear
- Be concise
- Follow directions
- Check your work

# Q1: Organization Description/Background

*(1,000 characters)*

## **Describe your organization**

*(# of staff and/or volunteers, clients served annually by entire organization, date founded, core services, impact or major accomplishments, vision for next 5 years, etc.)*

- **Choose the most relevant facts – Not ALL of them**
- **“Less is more” – We don’t need your entire history!**
- **If your agency is complex, give a brief summary**
- **Highlight “special” facts, such as heavy use of volunteers**

# Q2: Problem or Need

(1,250 characters)

**Describe the problem or need your program will address.**

- This is the *motive* for the program, not the program description
- Start with broad issues and work toward specific/local ones
- Write in terms of your clients' needs
- Again, do NOT describe your program here!



## Q2. Problem or Need

### Tips for your Need Statement

- **Use Current data**
  - Current Census data
  - Google Scholar
  - <http://nowdata.cinow.info>
  - Area Foundation library resources
- **Compare local data to state and national data**

# Q3. Fit with Funder Mission

*(500 characters)*

Describe how the program is related to the funding focus for the program area in which you are submitting.

- Here's your chance to make your case, just in case it's not obvious to the funder
- For the Area Foundation, see our “Measuring our Grant Impact” document at [www.saafdn.org](http://www.saafdn.org) → Nonprofits → Grants → Measuring Grantmaking Impact

# Area Foundation Funding Priorities

- **Animal Services**

Programs that improve the health and wellness of animals, educate our community about animal care and/or provide spay/neuter and/or adoption services.

- **Arts and Culture**

Programs and services that promote accessibility to the arts, encourage broad participation from all parts of our community and/or provide arts education and outreach.

- **Community-at-Large**

Programs that improve the safety and welfare of vulnerable and under-served populations, increase chances for individual/family success and self-sufficiency.

# Q4. People to be Served

*(1,000 characters)*

## **Describe the people to be served by this program**

*(with info such as, gender, ethnicity, geographic area, income and/or poverty level)*

- Profile of who you expect to serve
- Put in context of funding priorities

# Q5: Program/Project Description

*(1,250 characters)*

**Now we know what the problem is, what are you going to do about it?**

- Describe your **activities and timeline**
- **THIS** is where you explain your program. Sell it!

## Q6: Use of Funds

(500 characters)

**Briefly describe how the funds will be used.**

- THIS is where you will describe how the funds will be used if awarded (*i.e., Funds will be used for the salary of one counselor (\$12,000) who specializes in child and family counseling and the salary for one marketing/outreach coordinator (\$15,000)*)

# Q7-A: If an Ongoing Program/Project

*(1,250 characters)*

## How's the program going? What's new?

- Past indicators of success – client outcomes (statistics), anecdotes, or client testimonials.
- Challenges – things you've learned about how to improve the program.
- Recent enhancements – if it's a program that's been around for awhile and you've recently improved it, please share!

# Q7-B: If a New Program/Project

(1,250 characters)

**Explain why you think this will work – how will your program succeed in helping people?**

- Input from clients
- Evidence-based data and key studies that support it.

*Your approach does not have to be evidence-based, especially if it's a safety-net program.*



# Q8: Do You Plan to Collaborate?

(1,000 characters)

...on **THIS** program?

- If you have partners to make this program more effective, please explain their role.
- Will any grant funds be used to pay partners, or will they provide the services in-kind?

*This question does not imply that you are required to collaborate with other agencies. This is your opportunity to showcase that feature if you are collaborating.*

# Q9: Fit with your Mission

(750 characters)

## How does this program fit with your organization mission?

- It is incumbent on you to communicate this!
- If we don't see a good fit, we will not fund it.

*This is a chance to ask yourself whether this program will advance your mission.*

# Q10: Program Sustainability

(500 characters)

**Other plans to sustain this program? We understand that most nonprofits depend on grants, so that's not the issue.**

- Will you raise money from individual donors?
- Will the project generate any revenues?  
*(ticket sales, medical co-payments, etc.)*
- Any innovative ideas to help make this program pay for itself or be more cost-effective?

# Q11: Program/Project Evaluation

(1,000 characters)

**What change will occur in client's lives as a result of this program? How will you know this has happened?**

- How will people's lives improve? Relate to the problem or need statement.
- If your program does not produce lasting change in clients' lives, discuss other ways the program makes a difference.
- Identify measurement tools you will use – qualitative or quantitative (hint: “*SMART*” goals—*specific, measurable, attainable, relevant, time bound*)

# Q12: Metrics to be Tracked

*(1,000 characters)*

**What specific metrics will you track to evaluate your results? Please list 2-3 of these metrics and include your anticipated results**

## **Examples**

#1 We expect to serve 1,000 meals.

#2 We expect to provide after school programming to 250 children.

#3 We expect to log 750 volunteer hours.

**You will be asked to report back on these measurements as a part of your final report!**

# Q13: Relationship to the Field

*(1,250 characters)*

**What other nonprofit organizations in your area provide similar services? How are your services or approach different from theirs?**

- It is rare that you would be the “only” agency doing similar work. Check who else is out there.
- Do you compete or collaborate? Both?
- “Different” is not necessarily a judgment – it could be that you meet different needs or serve different geographic areas.

# The Budget

## Know your numbers!

- It helps to prepare your budget before you begin answering the questions.
- Make sure that your budget aligns with Question 6.
- No surprises!
- Be specific, thorough and realistic.
- Include in-kind donations in the income and the expense sections (including volunteer time).
- You **MUST** use the forms provided.

[http://www.independentsector.org/programs/research/volunteer\\_time.htm](http://www.independentsector.org/programs/research/volunteer_time.htm)

# Finalize and Check Before You Submit

**Double-check that all questions are answered and all attachments are included!**

- Reread the answers. Check for spelling and grammar errors.
- Have someone else read it and check it.
- Print a copy to see that all required documents are attached.
- It's okay to submit before the deadline!
- You have until 11:59 the day of the deadline, but no one will be available to assist you after 4:00 pm.



# For Information or Assistance

- Catherine Garcia, Grants Manager, [cgarcia@saafdn.org](mailto:cgarcia@saafdn.org), (210) 228-3757 (for technical issues related to the online application)
- Gavin Nichols, Director, Grants & Programs, [gnichols@saafdn.org](mailto:gnichols@saafdn.org), (210) 242-4720
- Lydia Saldaña, Director, Annual Responsive & Biomedical Research Grants, [lsaldana@saafdn.org](mailto:lsaldana@saafdn.org), (210) 228-3753

For more information, see [www.saafdn.org/AnnualResponsiveGrants](http://www.saafdn.org/AnnualResponsiveGrants)

# Making our community stronger ...



## We appreciate the work you do!