

GRANT WRITING FUNDAMENTALS

Dr. Jennifer R. Madden

THE RESEARCH SUGGESTS



next steps on the
JOURNEY

2. Grant Writing Toolkit (7/30/24)
3. Strategic Planning FUNDamentals (10/24/24)
4. Strategic Planning Toolkit (11/7/24)
5. Organizational Goal Setting (2/6/25)
6. Planning your Work, Working your Plan (2/20/25)



Grant Writing
FUNDamentals
(TODAY!)

next steps on the
**ELEVATE YOUTH
CAPACITY
BUILDING
JOURNEY...**



“To Go” Toolbox
• *Understanding the Grant
Management Process*



Grant Writing Fundamentals

- *Nine Key Components of the Grant Proposal*
- *Critical Tools*
 - *Data & Research*
 - *Design Tools*
 - *SMART Objectives*
 - *SWOT Analysis*
 - *ABCDs of Successful Collaboration*
 - *Logic Model*



AGENDA: GRANT WRITING FUNDAMENTALS

1. Dr. Madden’s Research
2. Grants Management Process
3. Grant Writing: Key Components of the Grant Proposal
4. “To-Go” Toolbox



Chat Storm



Core Concept &
Toolbox Icon



1

Dr. Madden's Research

2009 to 2015



“I GUESS I SHOULD’VE SEEN THIS COMING!”



31

INTERVIEWS

With Leaders Developing Affordable Housing

STARTED WITH THE LIVED EXPERIENCES OF LEADERS OF AFFORDABLE HOUSING DEVELOPMENTS

31

INTERVIEWS

With Leaders Developing Affordable Housing

15

COLLABORATIONS

Across the U.S.

Type of Collaboration

Successful

Less Successful

Tri-Sector (Government, Nonprofit & For-profit)

4

2

Government, Nonprofit & Nonprofit

5

2

Government, For-profit & For-profit

0

1

Government & For-profit

1

0

TOTAL

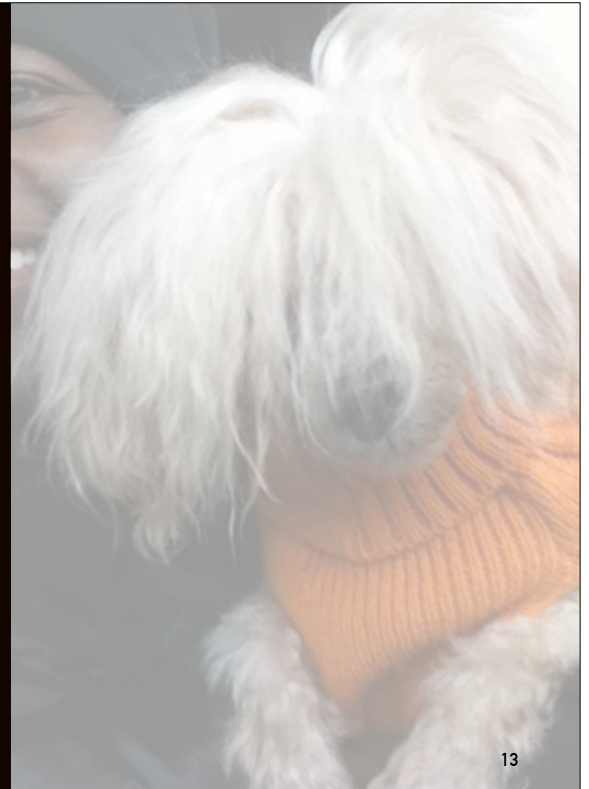
10 **SUCCESSFUL**
Affordable Housing Collaborations

5 **LESS SUCCESSFUL**
Affordable Housing Collaborations



BE-IN (BEING)

presence / mindfulness



13

13

Despite size, experience or if the collaboration was successful, collaborations for affordable housing encountered **four common barriers**:

- Funding Barriers
- Partner Barriers
- Community Barriers
- Government Barriers



14

14

CRITICAL DISCOVERY:
ALTHOUGH LEADERS OF SUCCESSFUL AND LESS SUCCESSFUL COLLABORATIONS ENCOUNTERED SIMILAR BARRIERS, CLEAR DIFFERENCES EMERGED IN THE ACTIONS TAKEN TO ADDRESS BARRIERS.



15

DR. MADDEN COLLABORATION RESEARCH: KEY FINDINGS

- **EMOTIONAL INTELLIGENCE.** Leaders of successful collaborations exhibited heightened emotional and social competencies.
- **OBSTACLES.** Leaders of successful collaborations tended to take actions for creating a better future. Less successful collaborations emphasized short-term viability.
- **FOCUS.** More successful collaborations tended to focus on mission and community development while less successful collaborations were focused on the deal.
- **CHANGE.** Successful collaborations adapt. Less successful collaborations fail early.

16

16

THE COLLABORATION BLUEPRINT (2009 TO 2015)

- 31 Semi-structured interviews with Leaders of Affordable Housing public-private partnerships (qualitative analysis)
- Survey of 416 “ordinary” (not designers) Leaders and Managers participating in inter-organizational collaboration (quantitative analysis)

17

17

THE COLLABORATION BLUEPRINT (2009 TO 2015)

- Results: Research findings and practical application
 - ABCDs of Successful Collaboration
 - The Collaboration Boot Camp
- Delivered through a Design framework
 - Inspiration (Visioning)
 - Ideation (SWOT Analysis)
 - Implementation (Logic Modeling)

critical tool

18

18

A

Autonomy

Authority and independence

B

Boundary Spanning

Linkages and interactions to leverage resources and support

C

Common Vision

A shared sense of purpose and responsibility that sustains and motivates

21

D

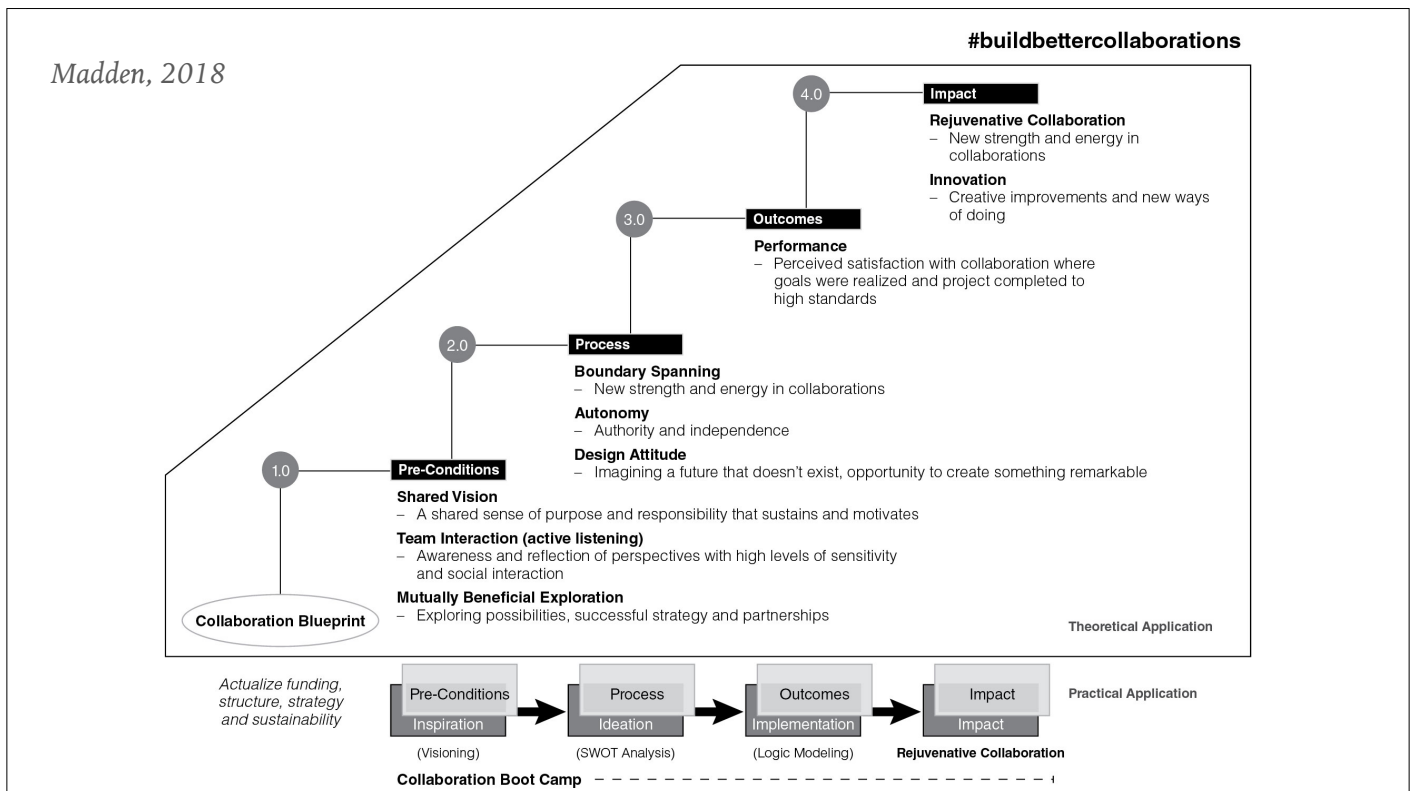
Design Attitude

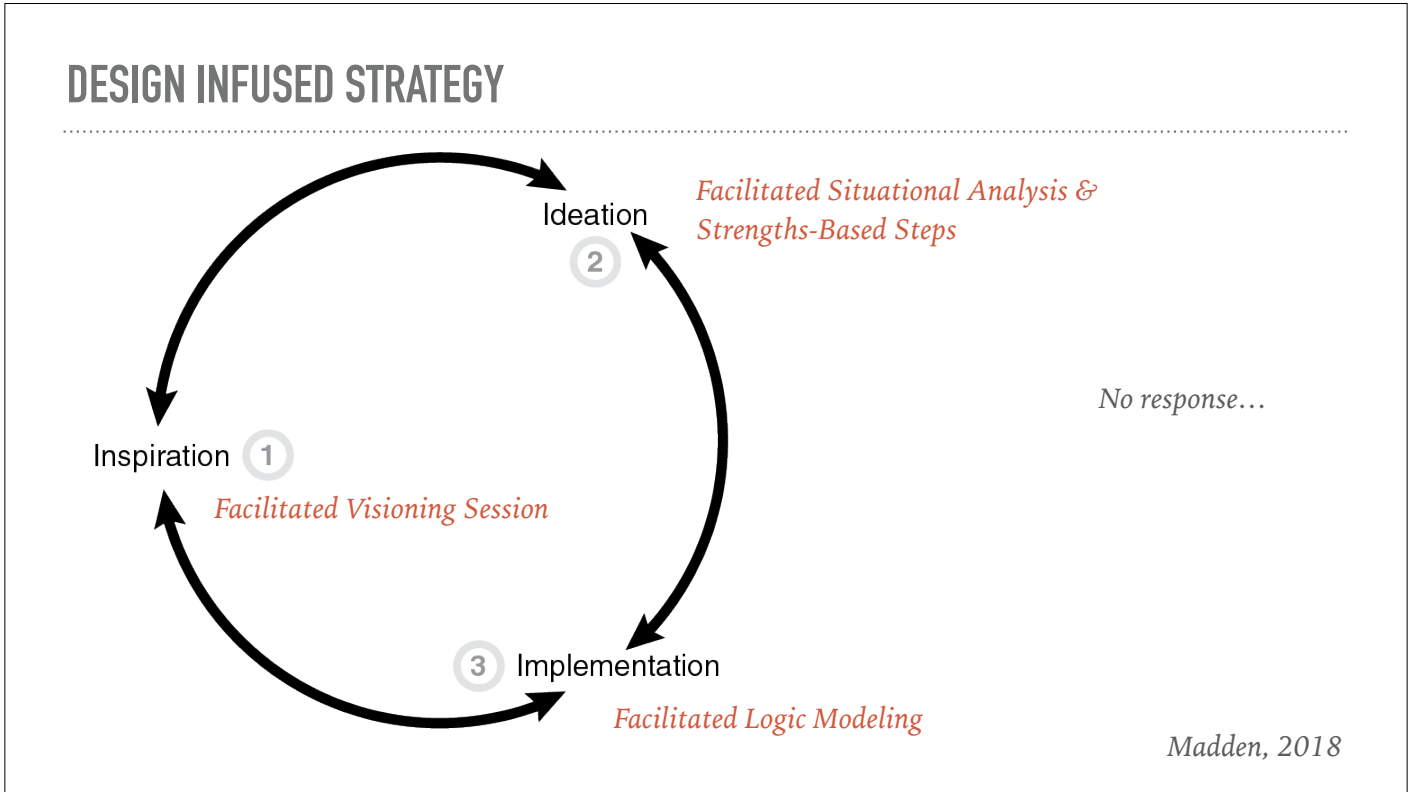
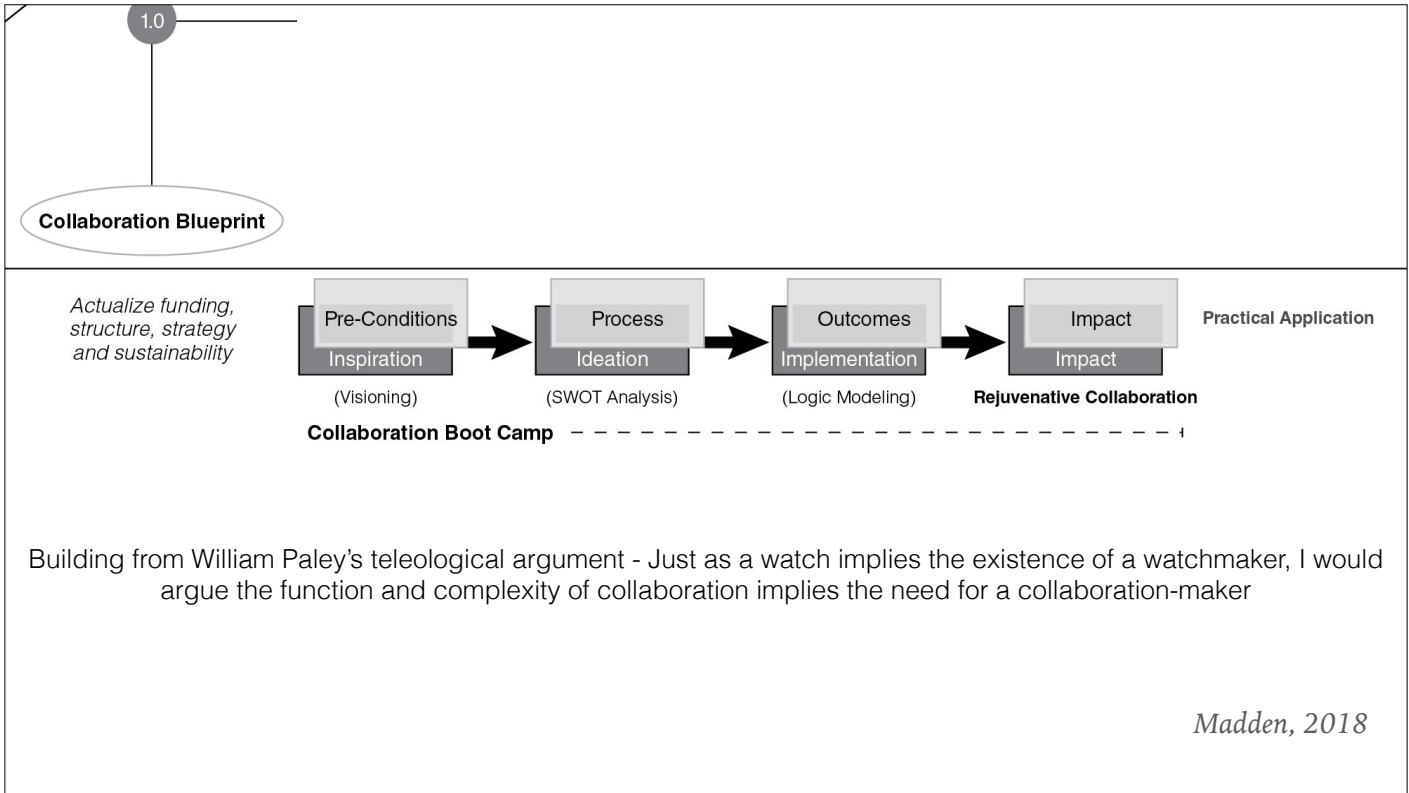
Imagining a future that doesn't exist, opportunity to create something remarkable

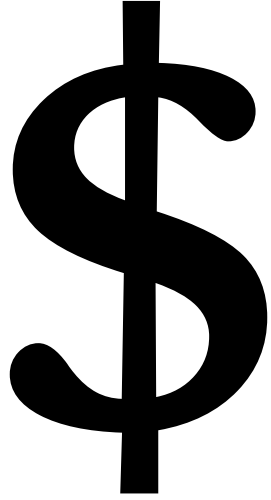
22

ADDITIONAL INSIGHT ON COLLABORATION FROM DR. MADDEN'S RESEARCH

- Active Listening
- Mutually Beneficial Exploration







TO DO LIST:

1. WAIT FOR TONIGHT
2. TRY TO TAKE OVER THE WORLD!



27

FRESH FOOD
& NUTRITION
EDUCATION
are cropping up in the
KINSMAN
NEIGHBORHOOD

BRIDGEPORT
Café

corn & scopia
place

Urban Café &
Community Kitchen
(July 2011)
Awarded: \$760,000



28






**Common Wealth
Kitchen Incubator**
Taking home cooking to the next level

**Systems Design for
Urban Farm & Food
Entrepreneurs**
(June 2012)
Awarded: \$789,000





29



Entrepreneurial Opportunity
(Workshops, Mentoring, Administrative Facilitation)

Career Advancement
(Construction Manager, Master Trainer, Construction Supervisor)

Jobs
(Contractors, Subcontractors, Year-round Employment)

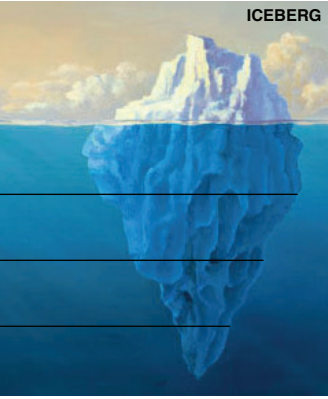
Training
(Cuyahoga Community College, Apprenticeship Training, GED, Roots to Success)

Supportive Services
(Housing, Soft Skills, Legal Services, Transportation)


Family Support
(Fatherhood Program, Financial Literacy, Childcare, Life Skills)

Community Building
(Community Give Back, Civic Engagement)

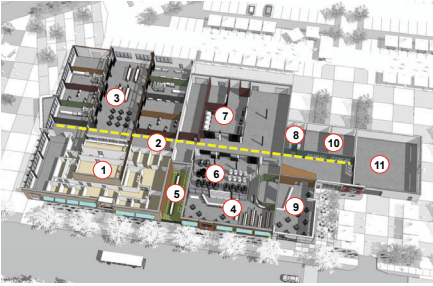
ICEBERG



Iceberg Project
*(because job creation for low-income
workers is just the tip of the iceberg)*
(July 2014)
Awarded: \$741,000



Combating Infant Mortality
(January 2014)
Awarded: \$2,000,000



Urban Food Hub (July 2014)
Awarded: \$800,000

30

Overview of EAT WELL Job/Business Creation & Expansion

Wages
 + Benefits
 + Employee Training
 + Career Advancement Opportunities
 + Marketable Skills Developed
 + Access to Healthy Affordable Food
 + Sustainable Employment & Business Opportunities for Low Income Individuals

= EAT WELL Advantage

EAT WELL Director 1

EAT WELL Cafe & Market 13

EAT WELL Food Pantry 1

EAT WELL Food Pharmacy 5

Supply Chain Local Business Creation/Expansion 4

Supply Chain Urban Farmer & Local Food Entrepreneur Business Creation/Expansion 8

[2016 Minimum Wage for Ohio = \$8.10]

Eat Well Director
\$80,000

Eat Well Cafe & Market Wages

- Retail Operations Manager - Chef	- Cold Prep - Entree Cook - Server - Steak
\$45,000 to \$55,000	\$10.50 to \$12.00 per hour
- Sanitation	
\$10.50 per hour	

Eat Well Food Pantry Wages

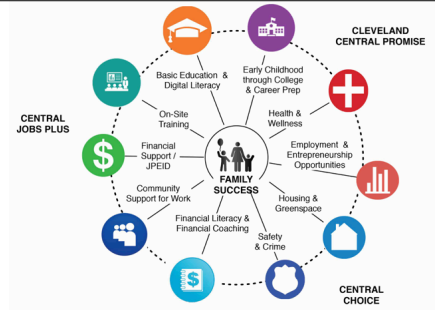
- Food Pantry Coordinator
\$11.50 per hour

Eat Well Food Pharmacy Wages

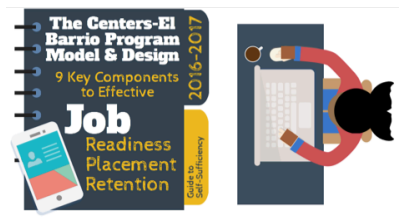
- Community Health Worker - Nutrition Assistant
\$10.50 to \$11.00 per hour
- Patient Care Technician
\$10.00 per hour

EAT Well Supply Chain Local Business/Urban Farmers/Food Entrepreneurs Wages & Benefits TBD

Healthy Food Cafe (October 2016)
Awarded: \$800,000



JobsPlus Pilot (April 2015)
Awarded: \$3,000,000



Job Readiness (May 2015)
Awarded: \$762,539

	BIOENERGY				BIOCHAR				
	Greenhouse Heating	Commercial Kitchen	Facilities Heating	Energy Production & Sales	Composting	Aquaponics	Tree Soil Amendments	Farm Soil Enhancements	Toxics Remediation
Rid-All Farm (Cleveland, OH)	✓	✓	✓	✓	✓	✓	✓	✓	✓
DBCFSN (Detroit, MI)	✓	✗	✗	✗	✓	✗	✓	✓	✓
Covenant Pathways (NM)	✓	✓	✓	✗	✓	✗	✓	✓	✓
Silver City Collab (NM)	✓	✗	✓	✗	✓	✓	✓	✓	✓

PROJECT MANAGEMENT (URBAN DRAWDOWN INITIATIVE)
 TECHNOLOGY (TROLLWORKS) &
 TECHNOLOGY TRANSFER (GILA WOODNET)

Equity-Based Regenerative Agriculture (October 2020)
Awarded: \$888,413



Cultural Public Market (August 2018)
Awarded: \$760,416

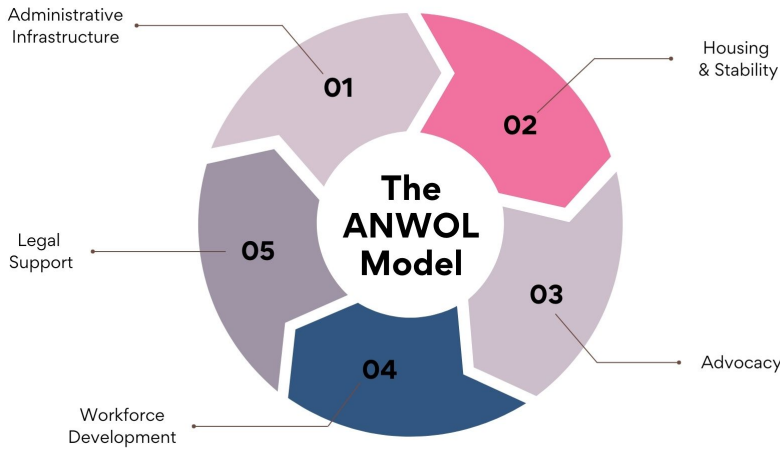
- 04 Veteran Cooperative**
Veteran Owners & Workers
- Veteran Owned Cooperative Products & Services: Micro-Greens / Basil & Composting, Landscaping & Snow Removal, Construction & Rehabilitation
- Veteran Affairs (VA) Offices across region as Anchor Institution Partners
- 03 Jobs & Entrepreneurship**
Employment, Entrepreneurship & Entrepreneur Support
- Farming, Composting & Landscaping
- Construction
- Entrepreneur Training & Technical Assistance
- 02 Training & Support**
Build Skills to Run Enterprises & Build a Veteran Cooperative
- Urban Agriculture & Farm Management
- Construction Trades
- Veteran Services
- 01 Veteran Housing**
Accessible & Affordable Housing Options
- Stability
- Community & Camaraderie
- Housing + Training Center + Work Facility Campus

Veteran Cooperative (September 2019)
Awarded: \$800,000

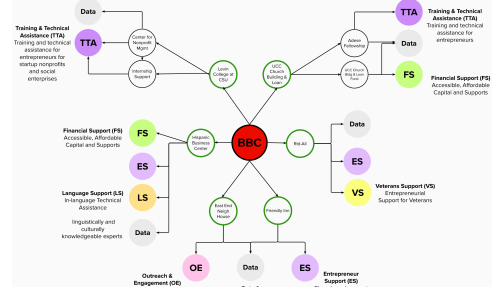
critical tool



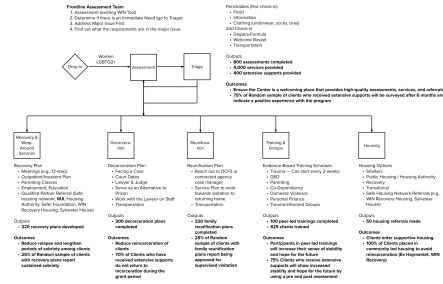
Workforce Collaborative (April 2019)
Awarded: \$4,400,000



SAFE Housing Network
(April 2023)
Awarded: \$4,000,000



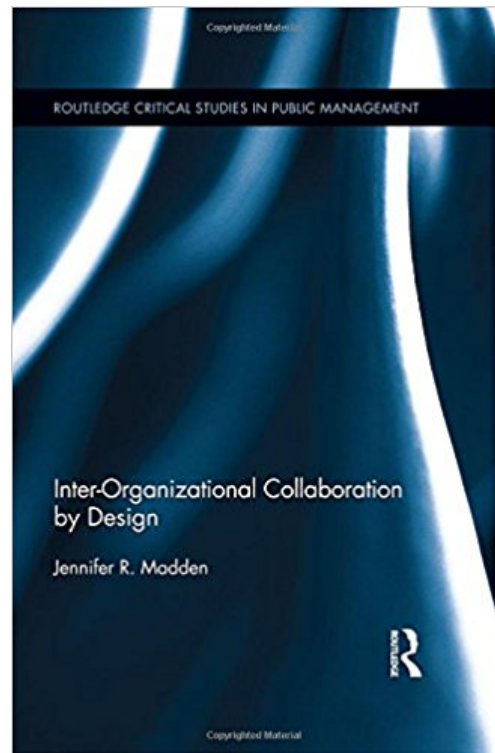
Micro Business Ecosystem
(October 2021)
Awarded: \$1,000,000



Drop-In Center (July 2022)
Awarded: \$4,500,000

INTER-ORGANIZATIONAL COLLABORATION BY DESIGN

Routledge Critical Studies in Public Management Series



COMING SOON...

The Grant Writer's Cookbook

by Dr. Jennifer Madden

35

2

**Grant
Management
Process**



36

GRANT MANAGEMENT PROCESS

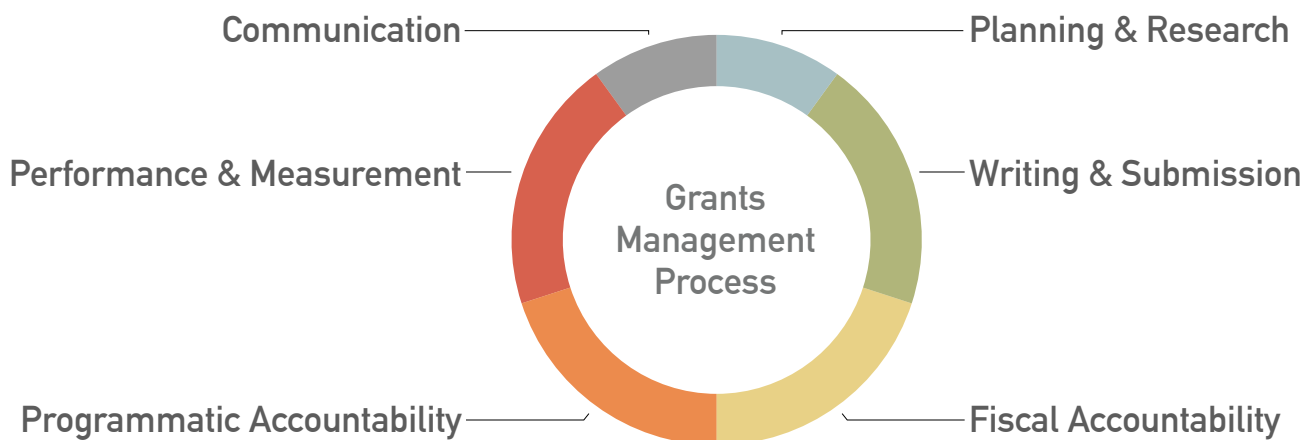
- Pre-award planning and research
- Grant writing and submission
- Reporting requirements for fiscal accountability
- Reporting requirements for programmatic accountability
- Post-award performance and measurement
- Communication (internal and external)



37

37

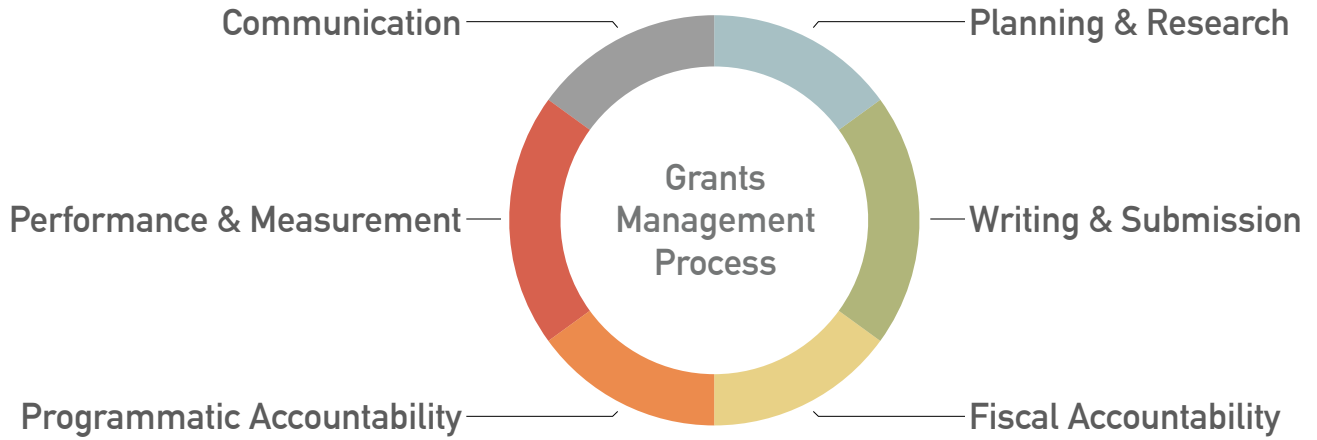
GRANT MANAGEMENT PROCESS



38

38

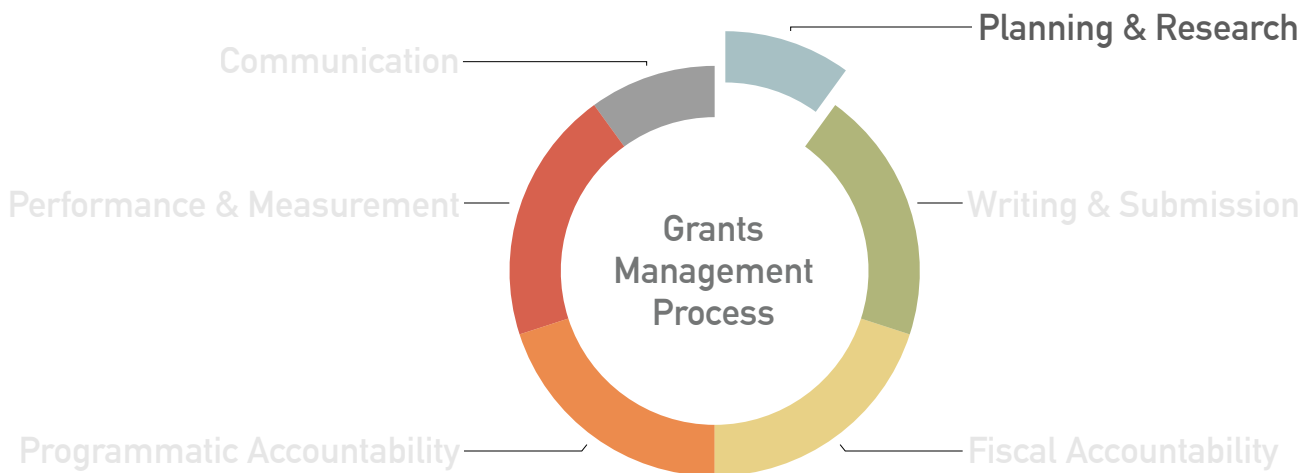
Where are your pain points?



39

39

GRANT MANAGEMENT PROCESS: PRE-AWARD PLANNING & RESEARCH



40

40

DATA & RESEARCH RESOURCES

- Federal Resources
- Think Tanks & Forums
- University Sponsored
- Management Consulting



critical tool

FEDERAL RESOURCES

- Census data — data.census.gov
- Bureau of Labor Statistics — <https://www.bls.gov>

FEDERAL RESOURCES ▶ Census data — data.census.gov

United States
Census
Bureau

oakland, california

SEARCH

Oakland city, California

People and Population

Race and Ethnicity

Health

Education

Business and Economy

Employment



Income and Poverty

Oakland city, California

Place in California



Oakland city, California is a city, town, place equivalent (CDP), or township located in California. Oakland city, California has a total area of 55.9 square miles.

			
POPULATION	MEDIAN HOUSEHOLD INCOME	POVERTY RATE	EMPLOYMENT RATE
421,042	\$68,442	17.6%	63.8%

Send Feedback

43

THINK TANKS & FORUMS

- ▶ Aspen Institute — <https://www.aspeninstitute.org>
 - ▶ Entrepreneurship — <https://www.aspeninstitute.org/tag/entrepreneurship/>
 - ▶ Micro-enterprises — <https://www.aspeninstitute.org/programs/field/>
- ▶ Policy Link — <http://www.policylink.org>
- ▶ Brookings — <http://www.brookings.edu>
- ▶ Urban Institute — <http://www.urban.org>
- ▶ MDRC — <http://www.mdrc.org>
- ▶ Bridgespan — <https://www.bridgespan.org/>
- ▶ Milken Institute — <http://www.milkeninstitute.org>
- ▶ Policy Bridge — <http://www.policy-bridge.org>

44

44

FOUNDATION SPONSORED

- ▶ Annie E. Casey Foundation — <http://www.aecf.org>
- ▶ Rockefeller Foundation — <http://www.rockefellerfoundation.org>
- ▶ Robert Wood Johnson — <http://rwjf.org>
- ▶ Kauffman Foundation — <http://www.kauffman.org>

45

45

UNIVERSITY SPONSORED

- ▶ Harvard University — <https://www.jchs.harvard.edu/research>
- ▶ University of Michigan — <https://poverty.umich.edu/>
- ▶ University of Michigan — <https://www.icpsr.umich.edu/web/pages/ICPSR/access/subject.html>
- ▶ Case Western Reserve University — <http://neocando.case.edu>

46

46

MANAGEMENT CONSULTING RESEARCH

- ▶ McKinsey & Company — <https://www.mckinsey.com/>
- ▶ IBM — <https://www.research.ibm.com/>
- ▶ A.T. Kearney — <https://www.kearney.com/>
- ▶ KPMG — <https://www.kpmg.us/insights.html>



INSIGHT ON GRANT SOURCES

- ▶ Foundations
- ▶ Corporations
- ▶ Government
- ▶ Resources



FOUNDATIONS

- Best known, least understood
- Established to support charitable efforts
- May adjust priorities
- Important part of funding mix

FOUNDATIONS: ADVANTAGES

- Mission is to give away money – required to do so
- Larger gifts
- Information is available
- Can serve as leverage

FOUNDATIONS: DISADVANTAGES

- Competitive
- Takes time to apply and receive
- Can be a limited investment
- Mission drift
- Limited use of funds
- Reporting requirements

FOUNDATIONS

- Types
 - Family
 - Community
 - Corporate
 - Public charities
- Funding Areas
 - Operating
 - Program
 - Capital
 - Challenge
 - Program Related Investments (PRIs)

FOUNDATIONS

- ▶ Annie E. Casey Foundation — <http://www.aecf.org/>
- ▶ Rockefeller Foundation — <http://www.rockefellerfoundation.org/>
- ▶ Robert Wood Johnson — <http://rwjf.org>
- ▶ Kauffman Foundation — <http://www.kauffman.org>
- ▶ Burton D. Morgan Foundation — <https://www.bdmorganfdn.org/>
- ▶ Silicone Valley Community Foundation — www.siliconvalleycf.org
- ▶ California Endowment — www.calendow.org
- ▶ Awesome Foundation — <https://www.awesomefoundation.org/en/chapters>
- ▶ Community Foundation Locator — <https://www.cof.org/community-foundation-locator>

53

53

PRO TIPS:



- ▶ Learn about a funder before submitting a grant proposal
- ▶ Ensure:
 - ▶ Your organization's work is a good fit with the funder's interests
 - ▶ Your organization is an eligible applicant under the funder's guidelines
 - ▶ The amount of money you plan to request is in keeping with the funder's history of giving
- ▶ Review the funder's website and 990 tax return

54

54

FORM 990

<https://projects.propublica.org/nonprofits/>

55

CORPORATIONS

- Attractors
 - Create PR Opportunities
 - Create Volunteer Opportunities
 - Board Members from Corporations



56

CORPORATIONS (EXAMPLES)

- ▶ **Apple.** While this tech behemoth isn't totally transparent about its grantmaking process, Apple has given hundreds of millions of dollars to local, national, and international nonprofit groups through programs like their Racial Equity and Justice Initiative. The most promising funding option is its Employee Giving program, in which Apple makes a monetary donation for every hour an employee volunteers at a nonprofit <https://www.apple.com/newsroom/2021/12/apple-marks-a-year-of-giving-in-the-communities-it-calls-home/> — or matches the dollar amount donated <https://doublethedonation.com/matching-gifts/apple-inc.>
- ▶ **AT&T** - AT&T's Online Learning Site Strives to Help Slow the Summer Slide. about.att.com/csr/home.html
- ▶ **Bank of America.** The Bank of America Charitable Foundation focuses much of its grantmaking for nonprofits on programs related to housing, jobs, and ending hunger. In 2021, BofA announced a four-year, \$1B initiative to fund economic mobility, health care, and racial equity. Since then, the company has been issuing requests for proposals twice a year. <https://about.bankofamerica.com/en/making-an-impact/grant-funding-for-nonprofits-mentorship-programs>
- ▶ **Clif Bar.** Twice a year, the Clif Bar Family Foundation awards grants to support the daily operating costs of grassroots organizations as well as specific projects. Applicants must meet two of their three funding priorities: Strengthen our food system; Enhance equitable community health outcomes; Safeguard our environment and natural resources. The deadlines to apply are March 1 and August 1. <https://cliffamilyfoundation.org/grants-program>
- ▶ **Coca-Cola.** The Coca-Cola Foundation offers community support by way of grants and sponsorships to a wide variety of organizations, donating \$1.5 billion dollars to charity since its inception. Just note that Coke does not fund initiatives that have a heavy focus on nutrition and physical activity—at least they stay on brand! <https://www.coca-colacompany.com/social/coca-cola-foundation>

57

57

CORPORATIONS (EXAMPLES)

- ▶ **Costco.** Costco's charitable giving is centered on nonprofit programs in that support children, education, and health and human services in communities where the wholesale giant has locations. Organizations can submit one funding application per fiscal year (September to August) on a rolling basis. <https://www.costco.com/charitable-giving.html>
- ▶ **Deere.** The John Deere Foundation partners with organizations including Habitat for Humanity, United Way, and One Acre Fund to support efforts for community development, education, and ending hunger. Its website highlights a few grants, including a STEM-based youth LEGO program, and nonprofits in Deere's "home communities" can reach out directly to see if they qualify for any other funding opportunities. <https://about.deere.com/en-us/our-company-and-purpose/empowering-communities>
- ▶ **Dick's Sporting Goods.** It's no surprise that Dick's Sporting Goods is a big supporter of youth sports programs. Dick's also helps cover the cost of athletic registration fees and equipment as well as resources for teachers. Nonprofits and public schools can apply online for grants up to \$25K, but you must have a Dick's Sporting Goods store located in your community to be eligible. <https://www.sportsmatter.org/s/grants-and-sponsorships>
- ▶ **GEICO.** The GEICO Philanthropic Foundation awards grants to charities focused on education, community engagement, diversity, equity, and inclusion. Eligible nonprofits can request funding for the following year from October 1 through December 31. <https://www.geico.com/philanthropic-foundation/>
- ▶ **Kroger.** Primarily focused on diversity, equity, inclusion, health, nutrition, ending hunger, and eliminating waste, Kroger donates \$300 million every year through its charitable giving arms, including the Zero Hunger | Zero Waste Foundation. You can read through their full guidelines and apply for a grant online. <https://thekrogerco.versaic.com/login?Select-A-Store=Enabled&ReturnTo=/default.aspx>

58

58

CORPORATIONS (EXAMPLES)

- ▶ **Microsoft.** Unlike other corporations on this list, Microsoft's offerings for nonprofits come in the form of technology grants and discounts. <https://www.microsoft.com/en-us/nonprofits/offers-for-nonprofits>
- ▶ **State Farm.** Jake from State Farm gives back! This insurance giant offers several community-based grants, including its Good Neighbor Citizenship program, which funds initiatives related to safety, community development, and education. Currently, the grant application process is by invitation only, but you can submit your program for consideration on their website. <https://www.statefarm.com/about-us/corporate-responsibility/community-grants>
- ▶ **Walmart.** Three times a year, Walmart awards Spark Good Local Grants of \$250 to \$5,000 to nonprofit initiatives that align with one of its four giving priorities: Creating Opportunity; Advancing Sustainability; Strengthening Community; Center for Racial Equity. Organizations can submit up to 25 applications each year to fund various programs. <https://walmart.org/how-we-give/program-guidelines/spark-good-local-grants-guidelines>
- ▶ **Wells Fargo.** Wells Fargo offers grants to local and national nonprofits that focus their efforts on "financial health, housing affordability, small business growth, and sustainability to address these complex societal issues and help create a more inclusive, equitable, and sustainable future." Even if you haven't been invited to submit a proposal, your organization can submit a grant interest form. <https://www.wellsfargo.com/about/corporate-responsibility/community-giving/grant-process/>
- ▶ **Whole Foods.** Whole Foods has several charitable initiatives through which it funds community-based organizations working for access to healthy foods, nutrition and wellness programs for kids, and efforts to alleviate poverty in the US and globally <https://www.wholefoodsmarket.com/mission-values/caring-communities>. Be sure to check out the Store Giving Program, which funds local nonprofits through a grant application and voting process twice a year <https://media.wholefoodsmarket.com/community-giving/store-giving/>.

59

59

GOVERNMENT

- ▶ Types
 - ▶ Grants
 - ▶ Fees for service
 - ▶ Contracts
- ▶ Sources
 - ▶ City
 - ▶ State
 - ▶ Federal



60

GOVERNMENT (FEDERAL, STATE & LOCAL)

- <http://grants.gov/>
- <http://grantfinder.com>
- <http://www.cfda.gov>
- <https://www.fedconnect.net/FedConnect/>
- <http://www.acf.hhs.gov/hhsgrantsforecast/index.cfm>
- <http://www.acf.hhs.gov/programs/ocs/>
- <https://www.grantwatch.com/cat/50/municipalities-grants.html>
- <http://www.statelocalgov.net/>

OTHER RESOURCES



- Grant Database Resources
 - Council on Foundations — <https://www.cof.org/>
 - Candid — <https://candid.org/>
 - Candid / Guidestar — <http://guidestar.org>
 - The Grantsmanship Center — <https://www.tgci.com/>
- Other Resources
 - <https://nff.org/learn/fundamentals-nonprofits>
 - Student Scholarships — <https://www.grantforward.com/search>



CHARITABLE GIVING

What do you think?

GIVING USA

Giving USA 2018 report found that charitable giving by American individuals, bequests, foundations and corporations to U.S. charities was an estimated \$410.02 billion in 2017. This was the first time charitable giving exceeded the \$400 billion mark.

June 2018

Source: GivingUSA 2018

For the first time ever, charitable giving exceeded the \$400 billion mark in 2017, spurred by growth from all four sources of giving.

\$410.02 billion

Where did the generosity come from?

Giving by Individuals ↑5.2% **70%**
\$286.65 billion

increased 5.2 percent (3.0 percent when inflation-adjusted) over 2016

Giving by Foundations ↑6.0% **16%**
\$66.90 billion

increased 6.0 percent (3.8 percent when inflation-adjusted) over 2016

Giving by Bequest ↑2.3% **9%**
\$35.70 billion

increased 2.3 percent (0.2 percent when inflation-adjusted) over 2016

Giving by Corporations ↑8.0% **5%**
\$20.77 billion

increased 8.0 percent (5.7 percent when inflation-adjusted) over 2016

Contributions by source
(by percentage of the total)

Giving by individuals increased \$14.27 billion over last year for a growth rate of 5.2 percent, on track with the growth in total giving.

Visit www.GivingUSA.org to learn more and to order your copy of *Giving USA 2018: The Annual Report on Philanthropy for the Year 2017*.

Giving to arts was the second-fastest growing subsector, with an 8.7 percent increase over the previous year to a total of \$19.51 billion in 2017.



Giving to foundations increased 15.5 percent in 2017, the largest gain of any subsector, far outpacing the growth in total giving.

Where are all of the charitable dollars going?

(as a percentage of the total)

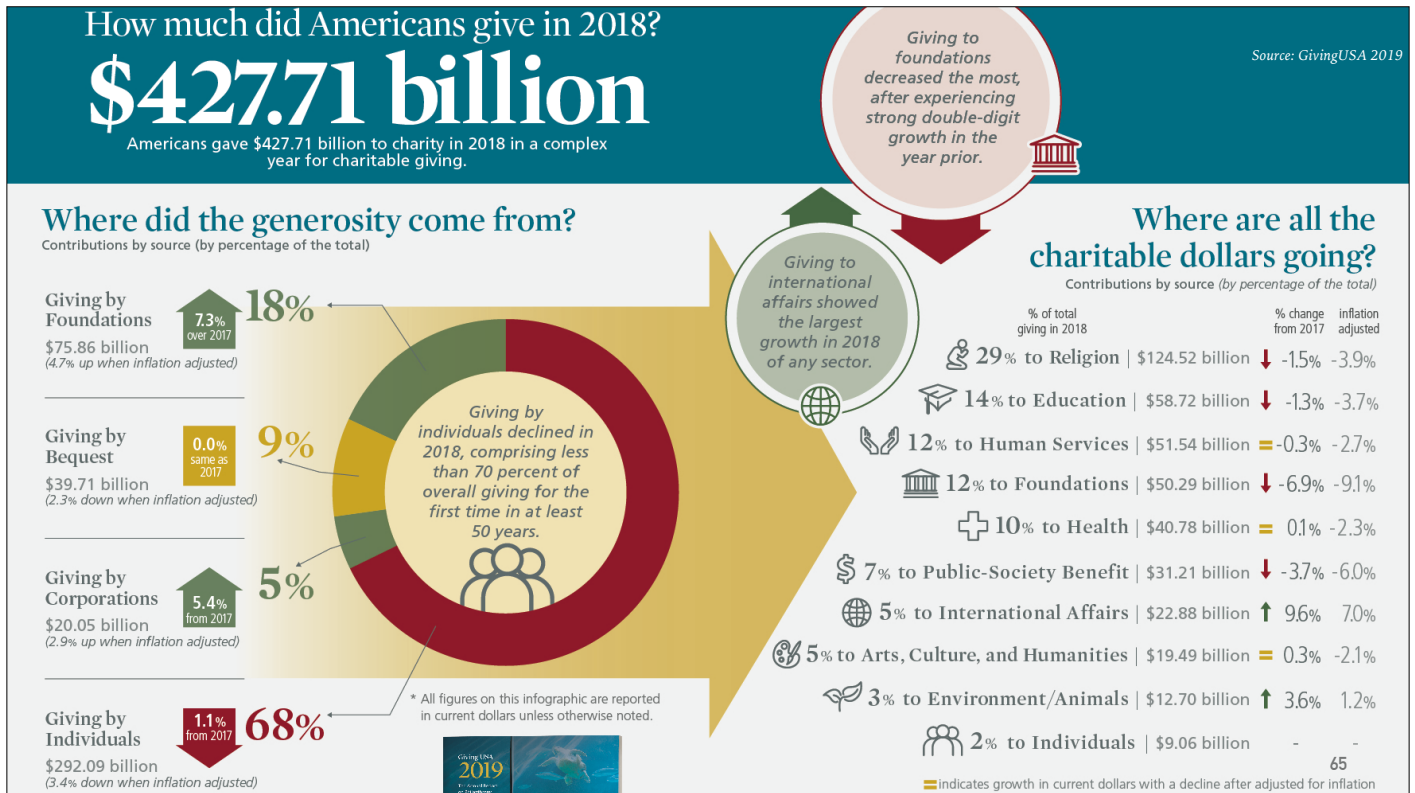
- 31% Religion \$127.37 billion
- 14% Education \$58.90 billion
- 12% Human Services \$50.06 billion
- 11% To Foundations \$45.89 billion
- 9% Health \$38.27 billion
- 7% Public-Society Benefit \$29.59 billion
- 5% Arts, Culture, and Humanities \$19.51 billion
- 6% International Affairs \$22.97 billion
- 3% Environment/Animals \$11.83 billion
- 2% To Individuals \$7.87 billion

The 6 largest subsectors all grew in 2017, but growth rates ranged widely from 2.9 percent all the way to 15.5 percent.

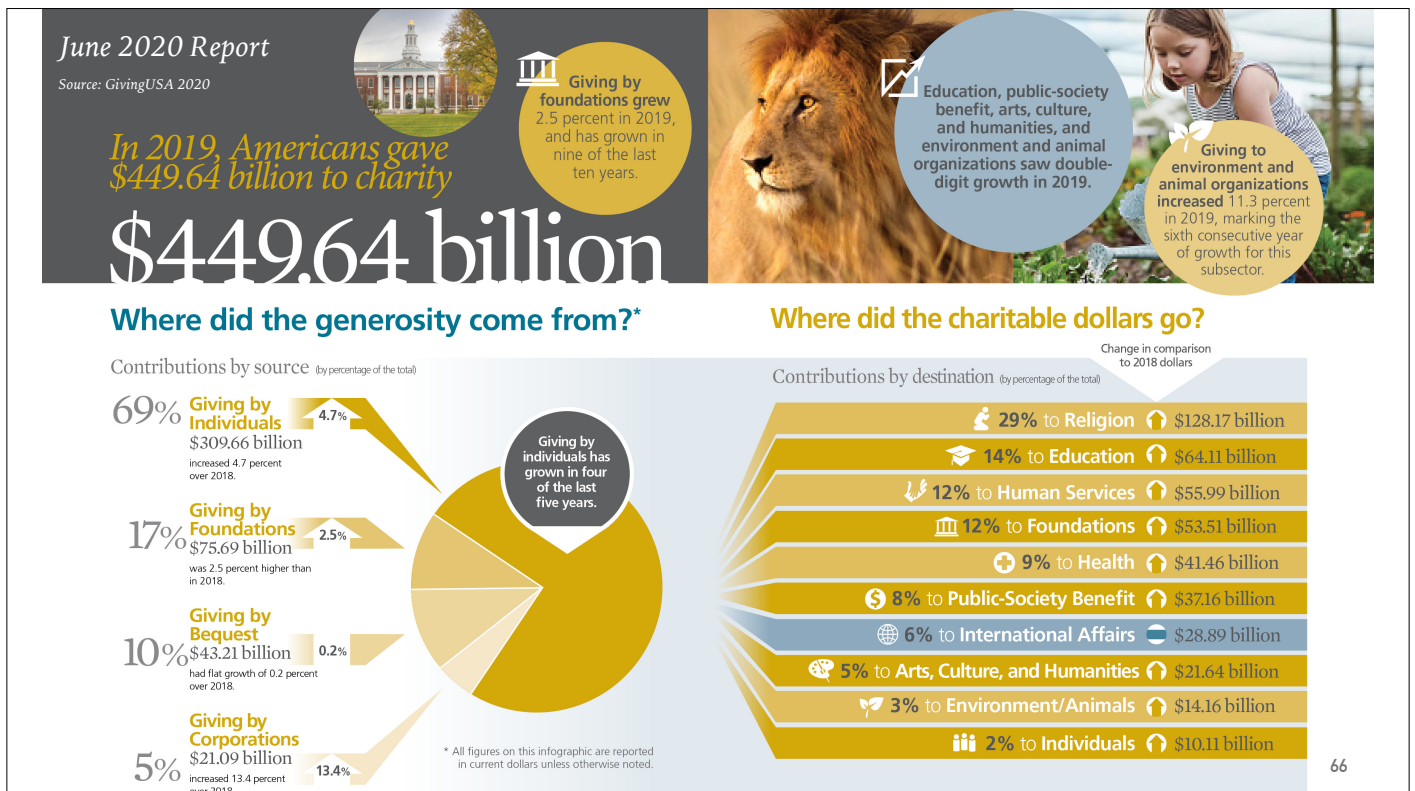
Giving USA Foundation™, The Giving Institute, and the Indiana University Lilly Family School of Philanthropy are pleased to continue their partnership in providing the most comprehensive, longest-running, and most rigorously researched resource on U.S. charitable giving, *Giving USA: The Annual Report on Philanthropy*. It is a privilege to report on Americans' generosity and related historical trends on U.S. charitable giving.



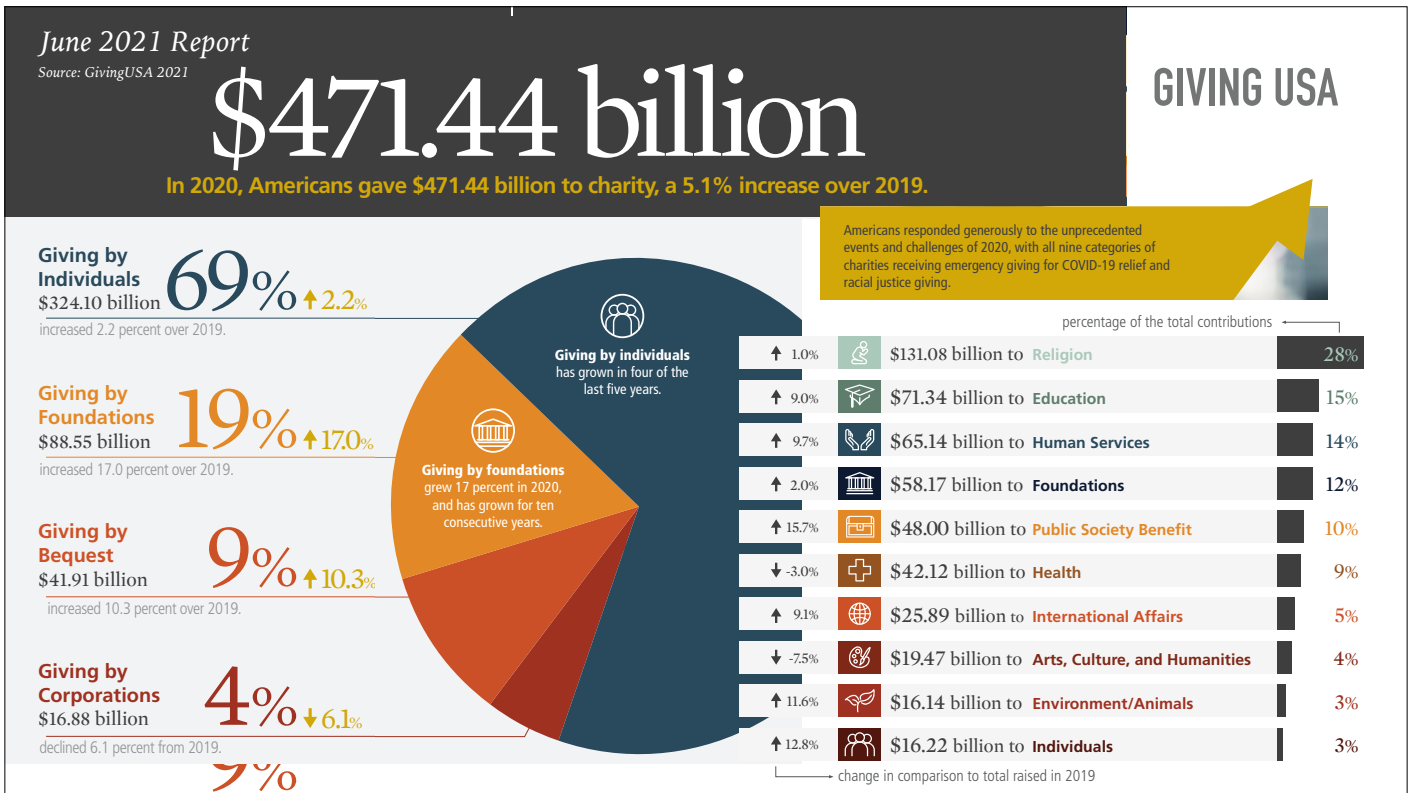
American individuals, bequests, foundations and corporations gave an estimated \$427.71 billion to U.S. charities in 2018, according to Giving USA 2019: The Annual Report on Philanthropy for the Year 2018.



Giving USA 2020 report found that American individuals, bequests, foundations and corporations gave an estimated \$449.64 billion to U.S. charities in 2019, placing it among the highest years ever for charitable giving.



Giving USA 2021 report found that American individuals, bequests, foundations and corporations gave an estimated \$471.44 billion to U.S. charities in 2020 according to findings in Giving USA 2021: The Annual Report on Philanthropy for the Year 2020.



June 2023

In 2022, Americans gave \$499.33 billion to charity according to findings in the Giving USA 2021: The Annual Report on Philanthropy for the Year 2023.

\$499.33 billion

64% \$319.04 billion

Giving by Individuals

↓ declined by 6.4% over 2021

21% \$105.21 billion

Giving by Foundations

↑ increased 2.5% over 2021

9% \$45.60 billion

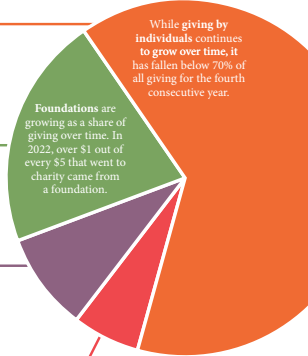
Giving by Bequest

↑ increased 2.3% over 2021

6% \$21.08 billion

Giving by Corporations

↑ increased 3.4% over 2021



* All figures on this infographic are reported in current dollars unless otherwise noted. Inflation was especially high in 2022, at 8.0%, and results may differ when adjusted for inflation. Learn more in the chapters.

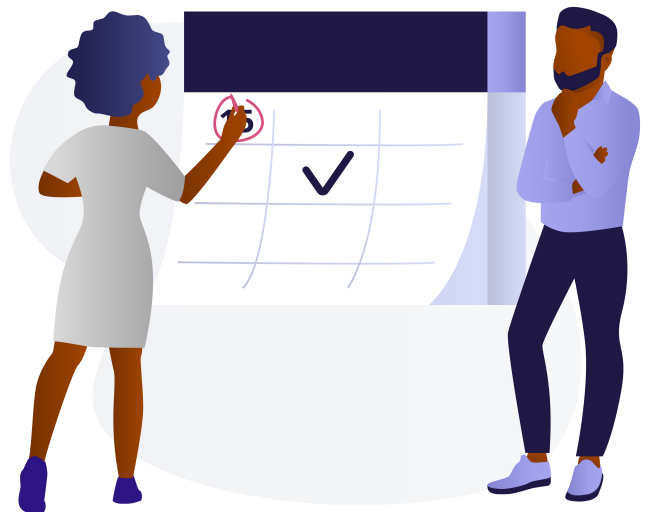
percentage of the total contributions*

↑ 5.2%	🙏	\$143.57 billion to Religion	27%
↓ 0.6%	👤	\$71.98 billion to Human Services	14%
↓ 3.6%	🎓	\$70.07 billion to Education	13%
↑ 10.1%	🏛️	\$56.84 billion to Foundations	11%
↑ 5.1%	🏥	\$51.08 billion to Health	10%
↓ 8.4%	💰	\$46.86 billion to Public-Society Benefit	9%
↑ 10.9%	🌐	\$33.71 billion to International Affairs	6%
↑ 2.9%	🎨	\$24.67 billion to Arts, Culture, and Humanities	5%
↓ 1.6%	🌿	\$16.10 billion to Environment/Animals	3%
↑ 0.6%	👤	\$12.98 billion to Individuals	2%

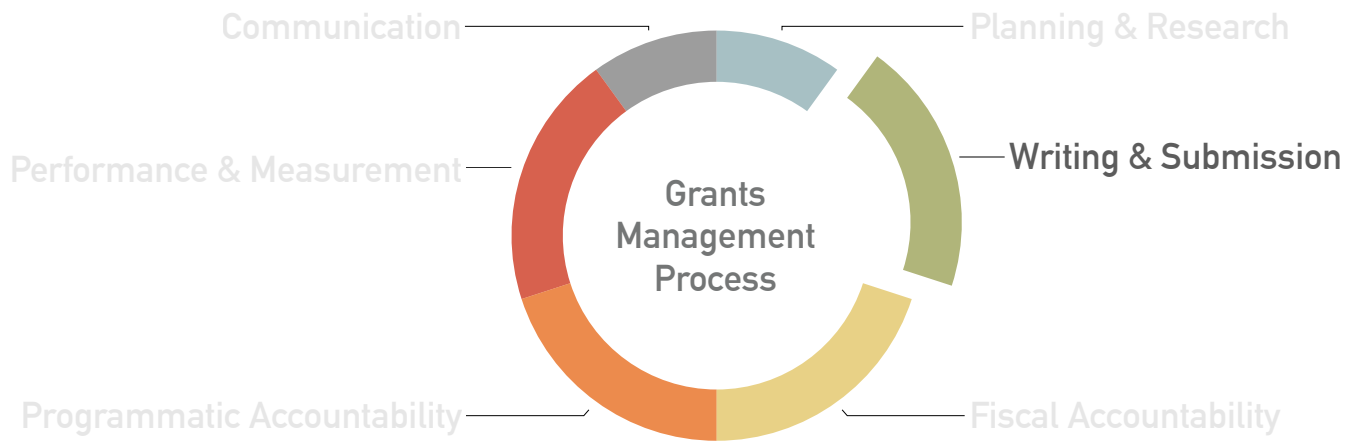
change in comparison to total raised in 2021

Source: GivingUSA 2023

QUESTIONS??



GRANT MANAGEMENT PROCESS: GRANT WRITING & SUBMISSION



3

Key Components of the Grant Proposal



GRANTS WRITING: KEY COMPONENTS OF THE GRANT PROPOSAL



- #1 — Summary
- #2 — Introduction
- #3 — Needs Statement
- #4 — Objectives
- #5 — Methods
- #6 — Evaluation
- #7 — Sustainability
- #8 — Budget
- #9 — Partners & Letters of Support
- #10 — Critical Tools
 - ✓ ABCDs of Successful Collaboration
 - ✓ Data & Research
 - SMART Objectives
 - Design Tools (Canva, Mural...)
 - SWOT Analysis
 - Logic Model

#1: SUMMARY



- Appears at the beginning of the proposal, but prepared after proposal is completed
- Clearly and concisely summarizes, and includes:
 - Identification of the applicant and their credibility
 - Outlines the reason for the request
 - Activities to be achieved through funding
 - Total cost of project, funds already committed, and amount requested

Project Summary/Abstract

Project Title: The Marketplace ("El Mercado")

Applicant Name: Northeast Ohio Hispanic Center for Economic Development

Address: 2511 Clark Avenue, Cleveland, OH 44109

Contact Numbers: Phone: 216.281.4422 Fax: 216.281.4222 Web: www.hbcenter.org

Email: JConteras@hbcenter.org (Jenice Contreras, Executive Director)

Project Abstract: The Northeast Ohio Hispanic Center for Economic Development (dba Hispanic Business Center) proposes *El Mercado*, a transformational vision for the Clark Fulton neighborhood in Cleveland, Ohio. A significant number of the Hispanic/Latino populations in the City of Cleveland are in poverty (38.5%), compared to Cuyahoga County (30.9%), Ohio (27.1%) and the U.S. (23.4%). Cleveland, the main metropolitan center of Cuyahoga County, also has incidences of unemployment higher than Cuyahoga County. More specifically, unemployment in the City of Cleveland (17.3%) is significantly higher than Cuyahoga County (9.7%), the State of Ohio (7.2%), and the U.S. (7.4%). In the Clark Fulton neighborhood, the unemployment rate is a staggering 21.7%. Amidst the challenges are significant opportunities, engaged stakeholders, and resilient neighborhood residents.

El Mercado is a strengths-based economic development strategy for the creation and expansion of microenterprises/microbusinesses and small businesses. *El Mercado* will be located in the Hispanic Village—"La Villa Hispana"—the Clark Fulton area with the densest population of Hispanic/Latino residents in the State of Ohio with numbers over 22,000. As an ethnically based marketplace, *El Mercado* is an evidence-based and research-informed national best practice for creating community economic centers that serve as a catalyst for neighborhood revitalization.

El Mercado will transform a vacant factory on a heavily traveled thoroughfare without any retail ready opportunities for small businesses into a thriving 48,352 square foot culturally-based public market with space for twenty-one (21) microenterprises, creating a distribution outlet for food entrepreneurs, maker entrepreneurs, and entrepreneurs providing services. *El Mercado* will also house additional offices and retail for other small businesses, community serving organizations, a restaurant, and a commercial kitchen.

Place matters, job creation is realizable, and Latino-owned businesses in the U.S. are growing at a rate that outpaces nearly every other ethnic group. However research shows many Latino-owned businesses are not served well by the financial mainstream because they are deemed too risky or do not have a sufficient track records. These are also real challenges locally as many Latino-owned businesses simply fail to register their business, and operate in the "shadow economy," which limits their ability to flourish. To enable success, *El Mercado* businesses receive culturally appropriate and linguistically relevant training, are partnered with mentors, and have access to capital.

Clevelanders with low-income are in need of a viable and inclusive economic strategy, that considers the community and personal barriers to self-sufficiency and their ability to thrive. The *El Mercado* transformation creates/expands 60 sustainable employment/business opportunities that did not previously exist, increases self-sufficiency of individuals and families with low-income, attracts additional investment, and improves the quality of life in both the Clark-Fulton neighborhood, and the City of Cleveland.

Project Summary/Abstract

Project Title: Bridgeport Market, Cafe & Community Kitchen (MC²)

Applicant Name: Burten, Bell, Carr Development, Inc. (BBC)

Address: Bridgeport Place, 7201 Kinsman Road, Suite 104, Cleveland, Ohio 44104

Contact Numbers: Phone: (216) 341-1455, Fax: (216) 341-2683

Web: www.bbdevelopment.org, **Twitter:** @BurtenBellCarr, **Facebook:** /BBCDev

Project Abstract: Kinsman is the poorest neighborhood in Cleveland. In 2009, Cleveland ranked 2nd poorest of all major cities with a poverty rate of 35%. Cleveland has been among the 12 poorest cities since 2000. Residents also suffer from acute food access challenges. A 2008 assessment revealed that fast food was 4.5 times more accessible than supermarkets. Despite the challenges, the number of community gardens, farmers markets, urban farms, and local food procurement programs has positioned Cleveland to be the second best local-food city in the U.S. BBC proposes a comprehensive approach to build upon this momentum to impact residents with the greatest need. The USDA Food Desert targeted for this initiative is 39035120100. The initiative will also impact several Low Access Areas (underserved by supermarkets/significant grocery retail leakage and demand) in Kinsman and neighboring Central.

The Bridgeport Market, Cafe & Community Kitchen (MC²) initiative is a comprehensive intervention designed to (1) create sustainable employment and business opportunities, (2) improve access to healthy affordable foods, and (3) promote education. Building upon the velocity of the community revitalization activities, the impact of the initiative will eliminate local food deserts, build food security, and develop vibrant communities of opportunity. The comprehensive effort is designed around developing a Market, Cafe and Community Kitchen. The Market has 4 distribution components: (1) healthy food retail, (2) fruit, vegetables and healthy meal truck for mobile distribution, (3) fruit, vegetables and healthy meal cart for healthy food options stationed at community events, and (4) a Farmers Market. The Cafe will offer a healthy variety of fresh salads, wraps, soups, baked goods, hand-crafted sandwiches on homemade breads, as well as vegetarian and vegan items. The Community Kitchen has several components (1) a training area for cooking classes and promoting health literacy for adults and youth, (2) facility for local farmers and gardeners to prepare and package food, (3) facility for harvest preservation, and (4) year-round garden club meetings and community garden events.

The MC² food hub will hire and train low-income persons from the community for these jobs, and additional job and entrepreneurship opportunities (64 total) will also be created for local farmers and growers whose yield will be sold through the distribution points. This comprehensive approach is more than access, this initiative is designed to create a variety of healthy food choice options, address or work-around personal and community barriers, change attitudes towards healthy food through education and marketing, leverage the existing momentum of neighborhood revitalization, and harness the local food movement to achieve stated impact.

Economic Development equals Bridgeport Market, Cafe & Community Kitchen (E=MC²).

75

75

Executive Summary

Central Jobs Plus Pilot

A Convergence Strategy for a Local, Place-Based, Job-Driven Approach to Increased Earnings and Employment Moving Public Housing Residents from Surviving to Thriving

Jobs Plus represents an evidence-based strategy for advancing employment outcomes and increasing earning for public housing residents to address acute joblessness and poverty in public housing developments. Cuyahoga Metropolitan Housing Authority (CMHA) has the managerial, technical, and administrative capacity to successfully implement a Jobs Plus Pilot (JPP).

CMHA will adopt the full Jobs Plus program in the Central neighborhood in Cleveland, Ohio. Moreover, securing a JPP represents a unique opportunity to create sustained and desired transformational change for public housing residents. This claim is based upon the potential convergence of critical evidence-based initiatives and strategies that can facilitate a multi-generational approach for family success and leverage collective impact. CMHA has been diligently working with a committed group of important actors from different sectors with a common agenda of providing a set of place-based strategies for addressing poverty. In a defined

76

#2: INTRODUCTION

- ▶ Description of qualifications
- ▶ Description of applicant or background of applicant
- ▶ Examples:
 - ▶ When organization started
 - ▶ Significant events in history
 - ▶ Prior and current activities
 - ▶ Accomplishments and impact
 - ▶ Size and characteristics of constituency
 - ▶ Assistance given to other organizations

University of Pittsburgh Medical Center (UPMC)

GUN VIOLENCE PREVENTION INITIATIVE

According to the October 2017 research report prepared by the Allegheny County Department of Health and Human Services, the homicide rate at 4.9 for the U.S. was almost double in Allegheny County at 9.6 and nearly four times higher for the City of Pittsburgh at 19.6. Young African American males (ages 15 to 34) had a homicide victim rate of 233 (nearly 48 times the national rate). Gun violence in the City of Pittsburgh in 2018 was significant with 146 aggravated assaults with a firearm, 118 non-fatal shootings, and 9-1-1 dispatches for shots fired totaling 1,959.

Gun violence injuries are a leading causes of death with an average of 96 Americans killed each day with guns. In addition to the tragic loss of life, gun violence has a negative impact on the economy and significant costs to hospitals and health systems. A Health Affairs study suggested hospital charges for gunshot patients averaged from \$5,254 for emergency room discharges to over \$95,000 for inpatient care, and the total individual financial burden for a gunshot victim estimated to be more than \$160,000 per patient.

According to a 2017 report to the American Hospital Association, the cost of community violence to hospitals and health systems was \$2.7B in 2016 with un- or under-compensated care representing 28.1% of that amount. Based upon report estimates, a 40-hospital health system proactive and reactive violence response efforts cost \$19.2M in a single year.

It is imperative that we approach this public health concern in an evidence-based, research-informed, inclusive, and apolitical manner to impact the complex factors associated with gun violence prevention—**Trauma Informed Community Development**. The Neighborhood Resilience Project (NRP) will serve as a mission perfect partner to develop, launch, lead, and manage this work as well as to serve as the conduit to effectively integrate the three (3) key pillars of community, government, and UPMC.

Neighborhood Resilience Project will implement a collaborative governance model utilizing a conciliar approach. Collaborative governance brings multiple stakeholders together across sectors to engage in consensus-oriented decision making. We will build upon our commitment to community, our strong history of collaboration, facilitative leadership, and impact to effectively lead a team of teams to bring to fruition the change we wish to see in Allegheny County.

#3: NEEDS STATEMENT



- Clearly related to the purpose and goals of the organization
- Supported by evidence
- Reasonable dimensions – can be achieved over the course of the grant
- Stated in terms of clients or constituents rather than the needs of the organization

Veteran Housing & Service Center
A Veteran Cooperative

I. Objectives and Need for Assistance

Project Goals and Objectives. The Veterans Housing & Service Center will create sustainable employment and business opportunities for low-income individuals that did not previously exist in the Union Miles neighborhood and beyond. The critical community and personal barriers that require solutions for this area are clustered around (1) high unemployment, lack of employment opportunities, high levels of underemployment (i.e., low wages, not enough hours), limited work experience; (2) high poverty levels and lack of ladders of opportunity out of poverty; (3) low educational attainment; (4) often limited success of micro enterprises owned by African Americans; and (5) unmet needs of microenterprises/microbusinesses and small businesses.

Need for Project. Ohio is the 7th largest state in the U.S. Eighty (80) of the 88 counties in Ohio are non-urban and account for approximately 53% of the population while the remaining eight (8) urban counties make up nearly 47% of the population. Urban Cuyahoga County is the most populous county in the state of Ohio, and Cleveland, its largest city, represents nearly a third of the population. Poverty levels for Cleveland are substantial, keeping the city among the 12 poorest in the U.S. since 2000. Even before the Great Recession, the poverty rate in Cleveland was 29.5%. Currently, 35.2% of the population in Cleveland is below the poverty level and unemployment is 16%.

High Unemployment. Cuyahoga County has a higher level of unemployment and poverty than state and national estimates. Cleveland, the main metropolitan center of Cuyahoga County has incidences of unemployment and poverty higher than Cuyahoga County. More specifically,

according to the most recent census estimates, unemployment is 6.6% for the U.S.; 6.5% for Ohio; 8.9% for Cuyahoga County; and more than double the national rate at 16% for the City of Cleveland (see Table 1). The unemployment rate in the census tracts in the Union Miles neighborhood range from 13.0% (census tract 1214.03) to a staggering 37.9% (census tract 1204).

Table 1: Unemployment, Poverty – 2017¹

Area	Population 16 years and over	Percent In Labor Force	Percent Not in Labor Force	Percent Unemployed	Percent Below Poverty Level
United States	255,797,692	63.4	36.6	6.6	14.6
Ohio	9,290,812	63.2	36.8	6.5	14.9
Cuyahoga County	1,021,907	63.2	36.8	8.9	18.3
Cleveland, Ohio	310,022	58.9	41.1	16.0	35.2

High Poverty. Poverty is especially high in the City of Cleveland with 35.2% of the population age 16 and over below the poverty line. These numbers far exceed national percentages, is high for children and African Americans (see Table 2).

Table 2: Percent Below Poverty Level – 2017²

Area	Percent of Population	Percent Under 18	Percent 18 to 64	Percent 65 years and over	Percent White	Percent African American
United States	14.6	20.3	13.7	9.3	12.0	26.2
Ohio	14.9	21.3	14.3	8.0	11.9	32.0
Cuyahoga County	18.3	26.9	17.4	10.7	10.8	33.4
Cleveland, Ohio	35.2	51.6	32.3	20.6	25.0	42.9

In order to understand the intensity of need for the area, it is important to examine the poor and near poor. In addition to the high poverty rate, there are many individuals that are close to being poor. For the population that poverty has been determined, 49.5% of the population in the City of Cleveland is below 150% of the poverty level. This number is twice as high as

¹ U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates; DP03 - Selected Economic Characteristics.
² U.S. Census Bureau, 2013-2017 American Community Survey 5-Year Estimates; S1701 - Poverty Status in the Past 12 Months.

STATEMENT OF NEED

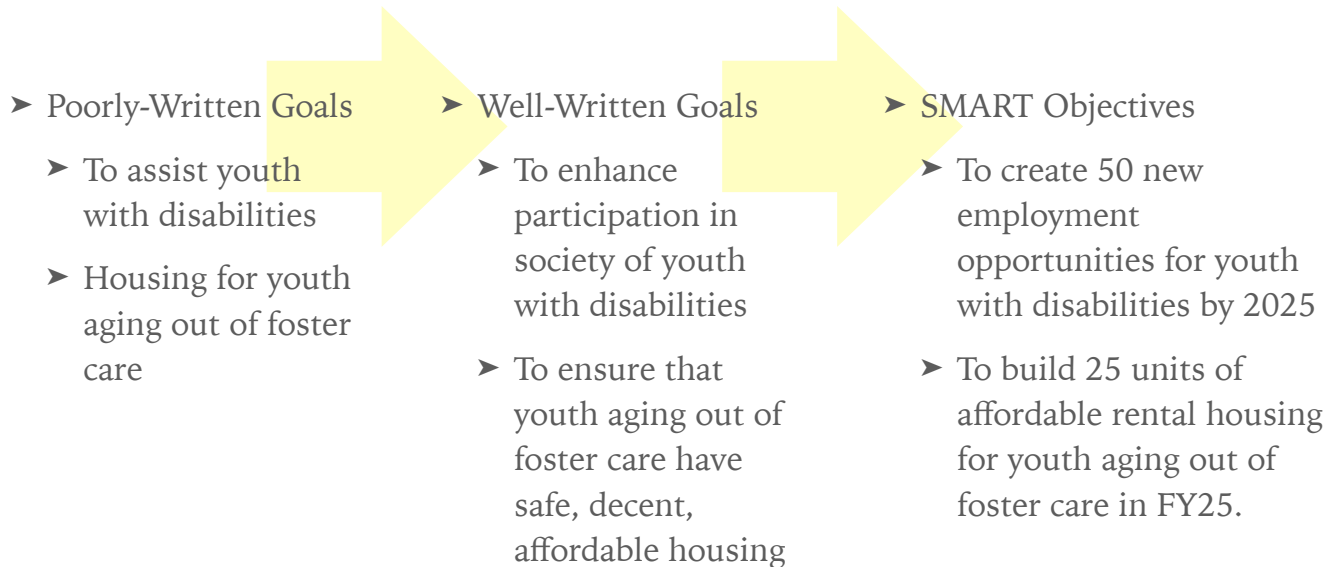
What issues are currently being faced by community members in the R3 zone/s to be served by the project? Describe how health, safety, and/or economic wellbeing are currently threatened. (15 points)

The imprisonment of US women has increased by over 700% since the 1980s and women are the fastest growing incarcerated population. Nationally, some 1.9 million women leave jails and prisons each year. For Illinois, that number is about 36,000. Like the rest of the country, Illinois provides extremely limited resources for recently released women, as reentry efforts largely focus on men. Formal and informal barriers for accessing essential recovery and wraparound services, strategies for decarceration, family reunification, evidence-based and trauma-informed training mar the reintegration process. Further, individuals recently released from prison are at the most risk of being homeless, with rates nearly 12 times higher than the public. For these reasons, far too many women cycle back into the criminal justice system as a result. These challenges are especially true for community members in our R3 zone where these risks are threatened across health, safety, and wellbeing. Consider the following...

#4: OBJECTIVES

- Outcomes of activities
- Problem-related outcomes of the program
- What will you increase... decrease... reduce?
- To be useful, program objectives should:
 - Tell **who**,
 - Is going to be doing **what**
 - **When**
 - **How much**
 - **How** we will measure it.

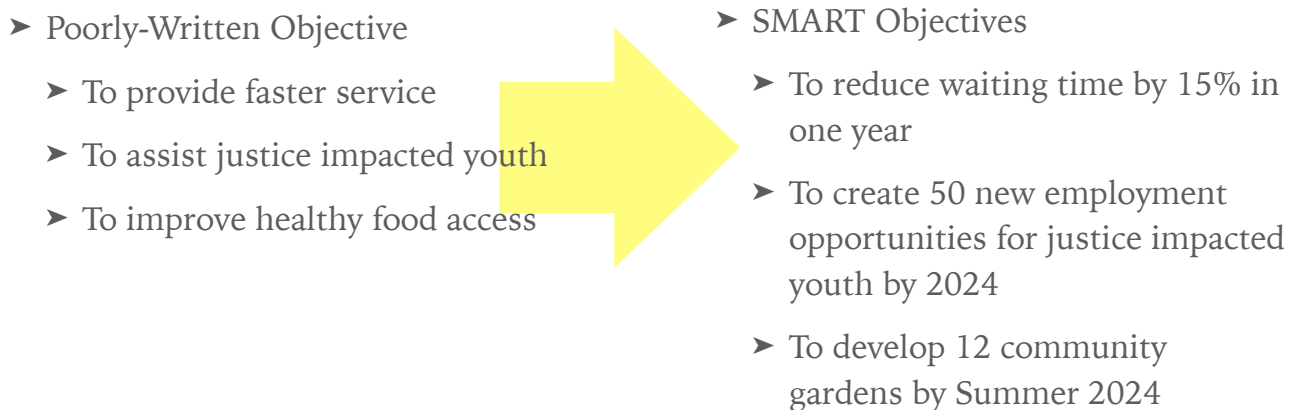
GOALS SHOULD SPECIFY CLEAR, PURPOSEFUL OUTCOMES



83

83

SMART AND NOT-SO-SMART OBJECTIVES



84



— Writing & Submission



CREATE A SMART OBJECTIVE

SMART objectives win! They demonstrate the impact you can have.

critical tool

85

85

#5: METHODS

- Steps taken to achieve desired results
- Requirements are Clarity and Justification
- Clarity
 - Understandable
 - Accompanied by an explanation of the rationale underlying their choice
- Justification
 - Description of applicant's past work
 - Presentation of evidence from the work of others in the fields
 - Presentation of research

86

#6: EVALUATION

- Product, Outcome or Impact Evaluation
 - The extent the program has achieved stated objectives
 - The extent to which the accomplishment of objectives can be attributed to the program
- Process Evaluation
 - Whether the program has been conducted in a manner consistent with the plan
 - The relationship of different program activities to the effectiveness of the program

#7: SUSTAINABILITY

- Future and other necessary funding
- Where will you find funding beyond the grant?
 - Social enterprise
 - Fee for service
 - Third-party payers
 - Non-grant fundraising programs
 - Profitable services to offset costs
 - Planning expanded fundraising efforts
 - Membership strategy as a fundraising strategy



#8: BUDGET & BUDGET SUMMARY

- Estimate of costs
- The numbers should be as specific as possible
- Categories:
 - Personnel costs
 - Non-personnel cost
 - Sometimes indirect costs
- Budget Summary
 - Written after the budget is complete
 - Narrates the details of the budget items

Table 37: SF 424A Budget Summary

Object Class Categories	Amount
Travel	\$5,000
Equipment	\$52,500
Supplies	\$2,500
Contractual	\$124,000
Construction	\$616,000
Total	\$800,000

Table 38: Sources & Uses Budget

	Year 1	Year 2	Year 3	Year 4	Year 5	TOTAL
Sources						
Health & Human Services	\$693,000	\$41,000	\$46,000	\$10,000	\$10,000	\$800,000
Total Sources	\$693,000	\$41,000	\$46,000	\$10,000	\$10,000	\$800,000
Uses						
<i>Veterans Housing</i>						
Site Work	\$150,000	\$0.00	\$0.00	\$0.00	\$0.00	\$150,000
Construction	\$210,000	\$0.00	\$0.00	\$0.00	\$0.00	\$210,000
Contingency	\$36,000	\$0.00	\$0.00	\$0.00	\$0.00	\$36,000
Total Veterans Housing	\$396,000	\$0.00	\$0.00	\$0.00	\$0.00	\$396,000
<i>Walter Collins Veterans Center</i>						
Construction	\$200,000	\$0.00	\$0.00	\$0.00	\$0.00	\$200,000
Contingency	\$20,000	\$0.00	\$0.00	\$0.00	\$0.00	\$20,000
Center Equipment	\$2,500	\$0.00	\$0.00	\$0.00	\$0.00	\$2,500
Center Supplies	\$500	\$500	\$500	\$500	\$500	\$2,500
Working Farm Equipment	\$50,000	\$0.00	\$0.00	\$0.00	\$0.00	\$50,000
Total Walter Collins Veterans Center	\$273,000	\$0.00	\$0.00	\$0.00	\$0.00	\$273,000
<i>Contractual</i>						
Urban Agriculture Training	\$22,000	\$0.00	\$0.00	\$0.00	\$0.00	\$22,000
Building Futures Training	\$0.00	\$36,000	\$36,000	\$0.00	\$0.00	\$72,000
Sustainable Landscaping Training	\$0.00	\$2,500	\$2,500	\$2,500	\$2,500	\$10,000
Entrepreneur Workshops	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
Veteran Cooperative Development	\$0.00	\$0.00	\$5,000	\$5,000	\$5,000	\$15,000
Total Contractual	\$23,000	\$39,500	\$44,500	\$8,500	\$8,500	\$124,000
Conference Travel	\$1,000	\$1,000	\$1,000	\$1,000	\$1,000	\$5,000
TOTAL USES	\$693,000	\$41,000	\$46,000	\$10,000	\$10,000	\$800,000



#9: PARTNERS & LETTERS OF SUPPORT

- ▶ Collaborative partners identified should submit letters of support to evidence commitment
- ▶ Letters should reference roles and responsibilities

Letters of Support: Sector, Source & Importance

<p>Sherrod Brown, U.S. Senator for Ohio Sherrod Brown was elected Sherrod to the United States Senate in 2006. He joined committees that are key to Ohio's future: Agriculture, Nutrition, and Forestry; Banking, Housing, and Urban Affairs; Health, Education, Labor, and Pensions (HELP); and Veterans' Affairs. In 2009, he was asked to join the Select Committee on Ethics. And in 2010, he left the HELP committee when he was selected to join the powerful Appropriations Committee, the first Democrat from Ohio to serve on it since the 1890's.</p>	Political
<p>Frank Jackson, Mayor, City of Cleveland The City of Cleveland is committed to improving the quality of life in the City of Cleveland by strengthening our neighborhoods, delivering superior services, embracing the diversity of our citizens, and making Cleveland a desirable, safe city in which to live, work, raise a family, shop, study, play and grow old.</p>	Community
<p>Victor A. Ruiz, Executive Director, Esperanza Founded in 1983, the mission of Esperanza is to improve the academic achievement of Hispanics in Greater Cleveland by supporting students to graduate high school and promoting post-secondary educational attainment. As a community partner, Esperanza will offer referrals, youth volunteers, and general access to our large network. Esperanza will also provide outreach and marketing support for the project.</p>	
<p>Juan Molina Crespo, Executive Director, Hispanic Alliance Hispanic Alliance was established in 2008 to provide an additional tier of leadership and support for organizations that serve Cleveland's Hispanic/Latino population. The Hispanic Alliance will work collaboratively providing technical assistance, referrals, outreach to vendors, and support as needed.</p>	
<p>Joel Ratner, President & CEO, Cleveland Neighborhood Progress Cleveland Neighborhood Progress is the largest community development intermediary in the region with over 25 years of experience in strengthening Cleveland's neighborhoods. Cleveland Neighborhood Progress is committed to creating communities of choice and opportunity and is partnering on this project to realize this vision for neighborhood residents. Cleveland Neighborhood Progress will offer referrals, technical assistance. Fundraising assistance. Capacity building and leveraged grant dollar assistance.</p>	
<p>Ray Leach, CEO, JumpStart JumpStart Inc. is a non-profit, venture development organization whose mission is to unlock the full potential of diverse and ambitious entrepreneurs to economically transform entire communities. JumpStart will provide technical assistance to entrepreneurs and appropriate referrals to capital resources and access to Jumpstart's Core City: Cleveland Impact Program and Encore Mentoring Program.</p>	
<p>Noel Poyo, Executive Director, National Association for Latino Community Asset Builders Represents and serves a geographically and ethnically diverse group of non-profit community development and asset-building organizations that are anchor institutions in Latino communities. Our mission is to build assets for Latino families, communities and organizations by supporting members with grants and other investments as well as by providing technical assistance</p>	
<p>Michal Micus, Executive Director, Hebrew Free Loan Association Jeff Ramsey, Executive Director, Detroit Shoreway Community Development Organization Ricardo Leon, Managing Director, Metro West</p>	Partners

critical tool

Images demonstrate the use of using Canva.com as a design tool, showing how Canva templates may help share information about reporting and impact.

IMPACT BY DESIGN

REQUEST: As a successful black intrapreneur/entrepreneur in South Africa, there is so much that can be learned from your experience that would impact young people entering the workforce, nascent intrapreneurs/entrepreneurs, and provide significant insight for South Africans as well as others around the world. We are requesting up to 90 minutes of your time for an interview to understand your story and unique pathway so that others may join the ranks of success in these ever increasingly difficult times.

WHY? Intrapreneurs and the entrepreneurial spirit are critical success factors for professionals and serves as a viable strategy for individual development, career advancement, wealth creation, and pathways out of poverty as well as imperative for thriving and sustained economic development.

OBJECTIVE: Complete twenty (20) interviews with a variety of successful black intrapreneurs/entrepreneurs in South Africa. This work is critical, timely, and relevant. The findings from the lived experiences of intrapreneurs/entrepreneurs will facilitate the creation of insight for black millennials in South Africa and beyond, finding their way in the corporate workplace to ensure they move from surviving to thriving. This work will also provide other intrapreneurs/entrepreneurs critical insight on pathways to success. Finally, this work will serve as a key starting point for others across the globe to learn from black intrapreneurs/entrepreneurs in South Africa.

GOAL:

SIGNIFICANCE: This project will have an impact on intrapreneurs/entrepreneurs as well as millennials building their career pathways. Carice Anderson and Dr. Jennifer Madden are both African American females from the U.S. with extremely unique educational and work experiences. Both women have significant industry experience that will add to the richness of this project.

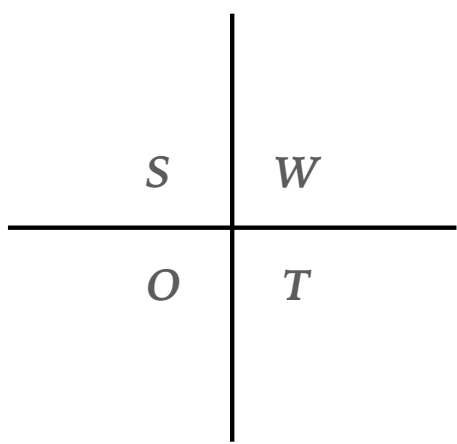
Carice L. Anderson holds an MBA from Harvard Business School (HBS) and is one of about 600 African American women who graduated from HBS. Carice has led in Johannesburg since 2011. While in the U.S., Carice worked for powerhouse business consulting firms such as Arthur Andersen and Deloitte Consulting. In Johannesburg, Carice worked with two of the "Big Three" (the world's most prestigious management consulting firms) McKinsey & Company and Bain & Company. Carice also served as Head of Entrepreneur Development at the SEED Academy. Carice is the founder and current Leadership Consultant for Anderson Leadership Advisory.

Dr. Jennifer R. Madden holds a Ph.D. in Management from the Weatherhead School of Management at Case Western Reserve University. Dr. Madden is one of about 1,300 people of color who hold a Ph.D. in one of the Business disciplines in the entire U.S. Her new book, *Intra-Organizational Collaboration by Design* in the Routledge Critical Studies in Public Management Series, examines how successful collaborations overcome barriers to innovate and regenerate communities. Dr. Madden is currently an Assistant Professor of Management & Marketing and the Director of the Master (MSc) of Business Design & Innovation Program at Carthage College.



SWOT ANALYSIS

- Strengths
- Weaknesses
- Opportunities
- Threats (or Challenges)

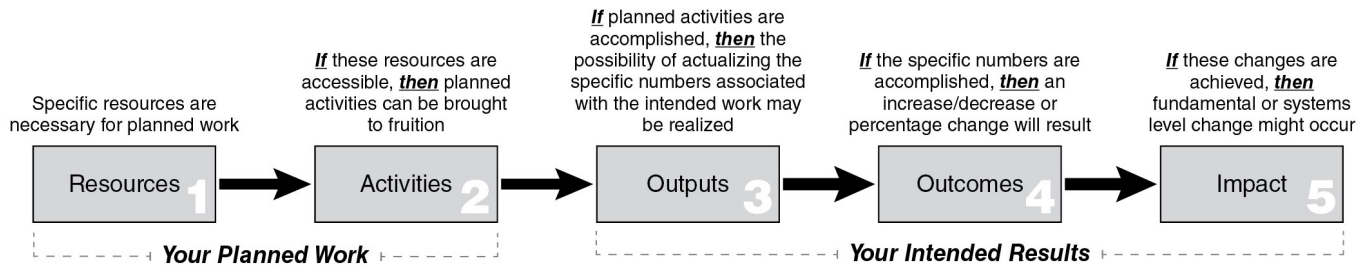


critical tool

★ Additional discussion on SWOT Analysis October 24th Strategic Planning FUNDamentals.

LOGIC MODEL

critical tool



★ *Additional discussion on Logic Models*
October 24th Strategic Planning
FUNDamentals.



Madden, 2018

95

95

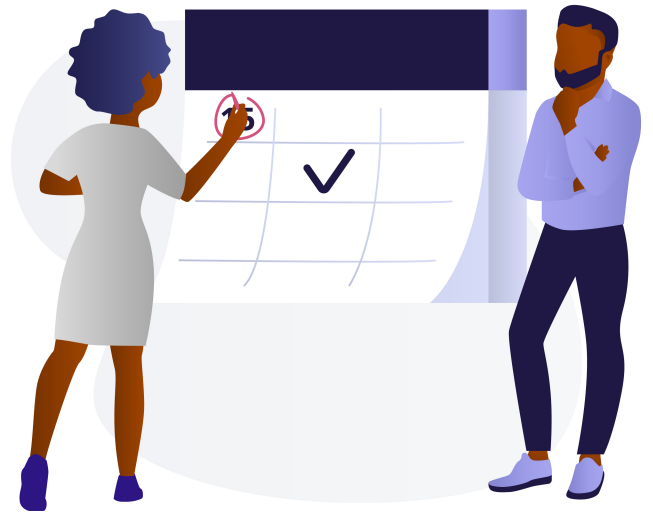
#10: CRITICAL TOOLS

- Data & Research
- SMART Objectives
- Design Tools
 - Canva — <https://www.canva.com/>
 - Mural — <https://www.mural.co/>
- SWOT Analysis
- Logic Model

96

96

QUESTIONS?



97



ACTION STEPS:
TO DO NEXT 3 DAYS
TO DO NEXT 3 WEEKS
TO DO NEXT 3 MONTHS



98

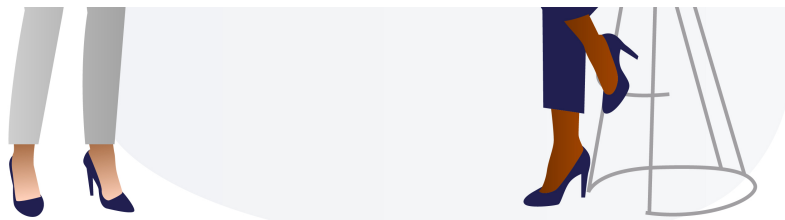
4

toolbox

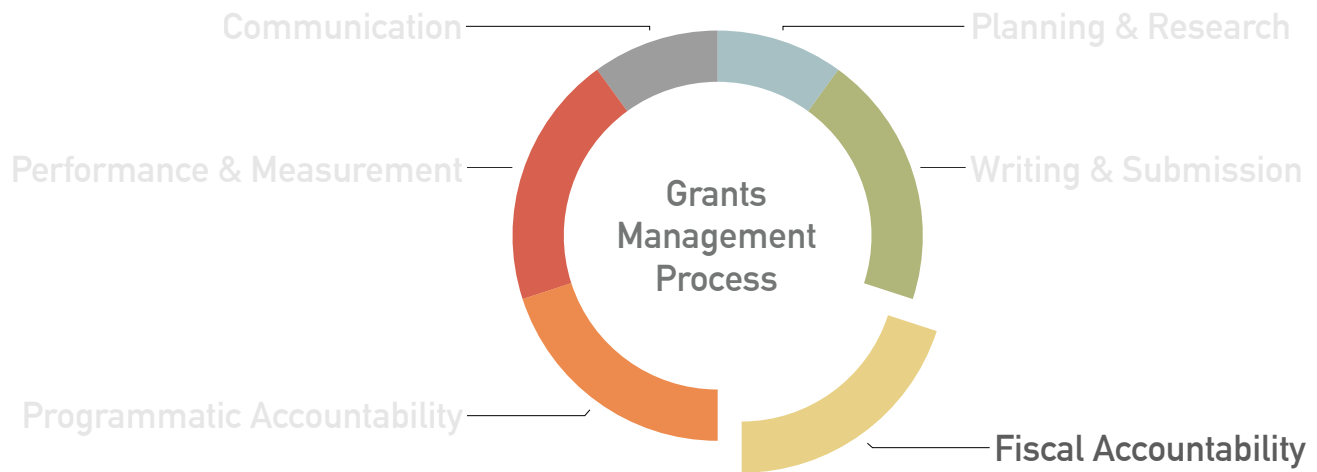


GRANT MANAGEMENT PROCESS

Continued...



GRANT MANAGEMENT PROCESS: REPORTING FOR FISCAL ACCOUNTABILITY



101

101

YOU WON THE GRANT!

- ▶ Grant awards can be made by letter, through a form, or in an informal way
- ▶ When a grant award is accepted, the implementation of the project begins on a specific date
- ▶ At this point, the grantee has to manage the grant from both a financial and programmatic standpoint until the final date of the grant award period
- ▶ Grant awards typically cover a 12-month period (unless a grantee has received a multi-year or continuation grant)
- ▶ Some grantees receive a 3-month period after the end date to submit a final programmatic and financial report.
- ▶ Not submitting final reports can result in the loss of the final payment, or future funding placed in jeopardy.

102

102

FISCAL ACCOUNTABILITY

- Fulfill financial reporting requirements
- Account for grant revenue and expenses
- Money you raise through individual giving, membership drives, events, product sales, and other fundraising activities can be used flexibly. Grants are different.
- Grants have very specific uses (restricted funds) making fiscal accountability an imperative
- Understand the ins and outs of procurement and the disposition of property

103

103

KEY CHARACTERISTICS OF ORGANIZATIONS WITH HIGHLY EFFECTIVE FINANCIAL MANAGEMENT

- Written and followed policies and procedures
- Qualified and trained financial staff
- Effective communications
- Succession planning and cross-training
- Self-assessment and continuous improvement
- Active, knowledgeable and informed Board and finance committee

104

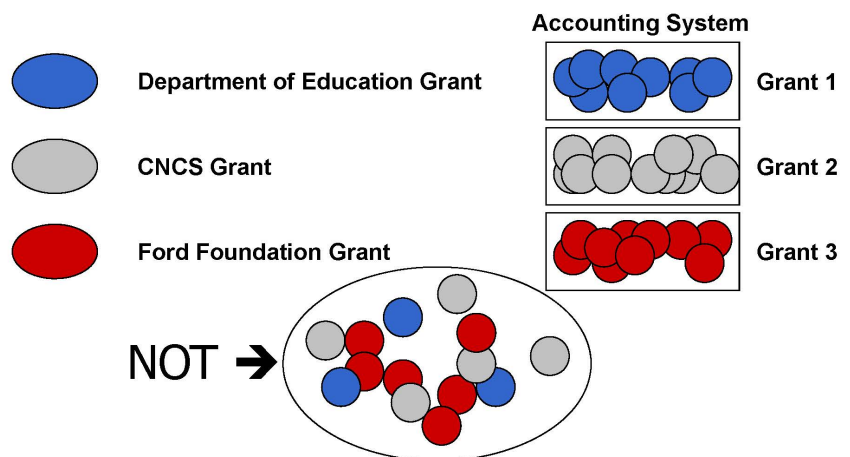
104

ALLOWABLE, REASONABLE & ALLOCABLE

- ▶ Allowable—A cost within award limitations consistent, documented, reasonable & allocable
- ▶ Reasonable—A cost that does not exceed what a prudent person would do under the circumstances at the time the decision
- ▶ Allocable—Treated consistently with other costs incurred for the same purpose in like circumstances and benefits the award and can be distributed proportionally to the benefits received

105

105



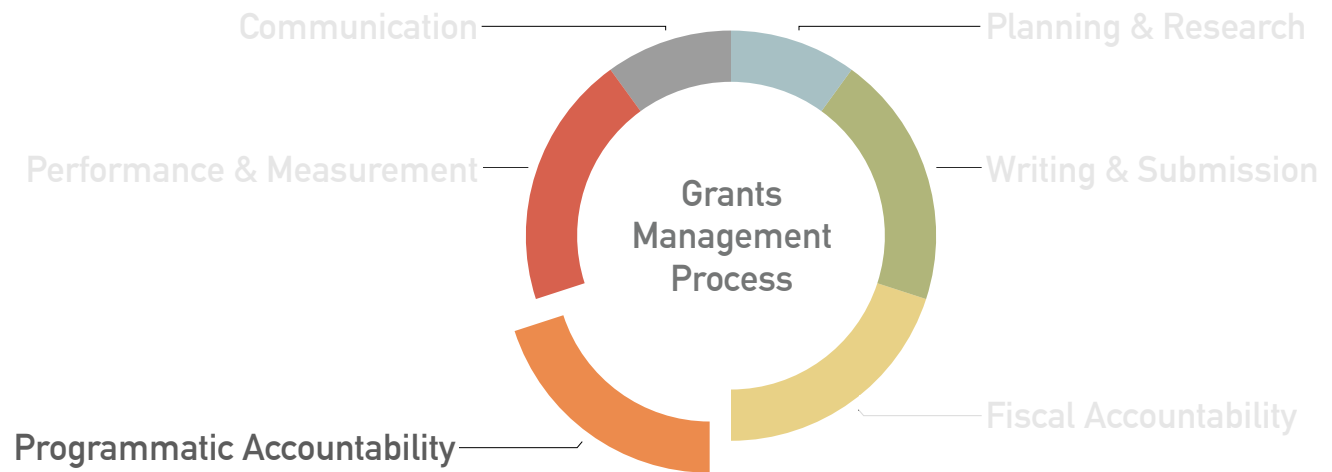
ACCOUNTING SYSTEMS

Must Properly Segregate Funds

106

106

GRANT MANAGEMENT PROCESS: REPORTING FOR PROGRAMMATIC ACCOUNTABILITY



107

107

PROGRAMMING

- Create MOUs for project partners
- Training, monitoring and oversight of subgrantee or participant compliance
- Accurate, timely and complete program and performance reporting
- Ensure key staff understand roles, responsibility, understand each other's priorities and work together
- Follow the terms and conditions of the grant

108

108

PROGRAMMING ACCOUNTABILITY

- Organize requirements for solid grants management
- Establish roles and responsibilities for your nonprofit grant management team
- Fulfill reporting requirements throughout the grant award period
- Make requests for changes to an award in a timely manner
- Submit final reports in a timely manner
- Follow closeout procedures

109

109

YOU FINISHED THE GRANT!

- Some grantees receive a 3-month period after the end date to submit a final programmatic and financial report.
- Not submitting final reports can result in the loss of the final payment, or future funding placed in jeopardy.

110

110



Candid.

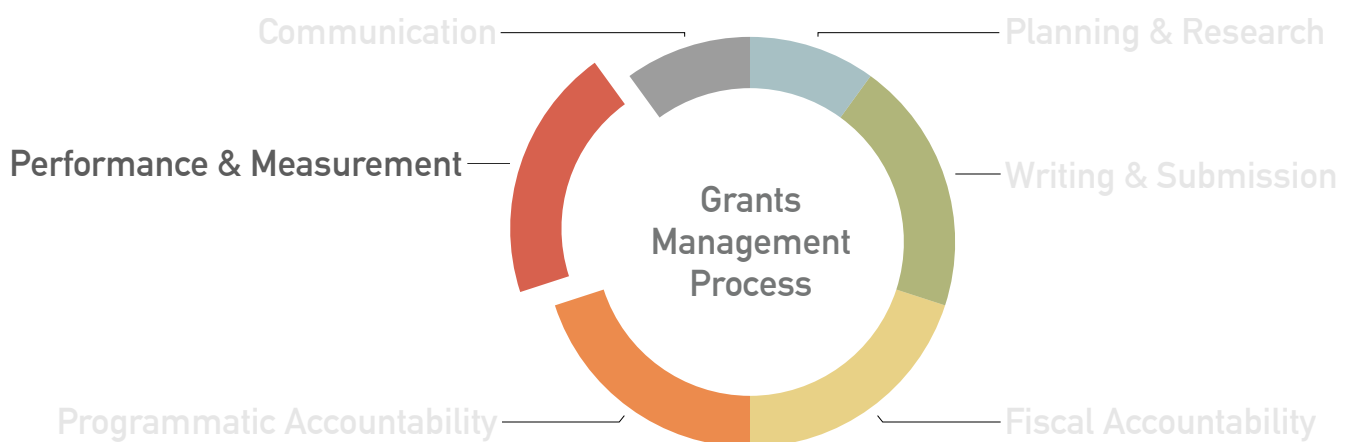
TOOLS

- <https://www.ecivis.com/>
- <https://www.fluxx.io/>
- <https://candid.org/>

111

111

GRANT MANAGEMENT PROCESS: PERFORMANCE MEASUREMENT



112

112

PERFORMANCE MEASUREMENT: SETUP

- Contract (including revisions)
- Grants checklist
- Application/proposal
- Proposal review comments
- Performance reports
- Financial reports
- Timesheets
- Audits
- Monitoring/site visits
- Invoices/purchase orders/receipts
- Program documentation (sign-in sheets, etc.)
- Publicity/marketing
- Correspondence
- Training
- Other

113

113

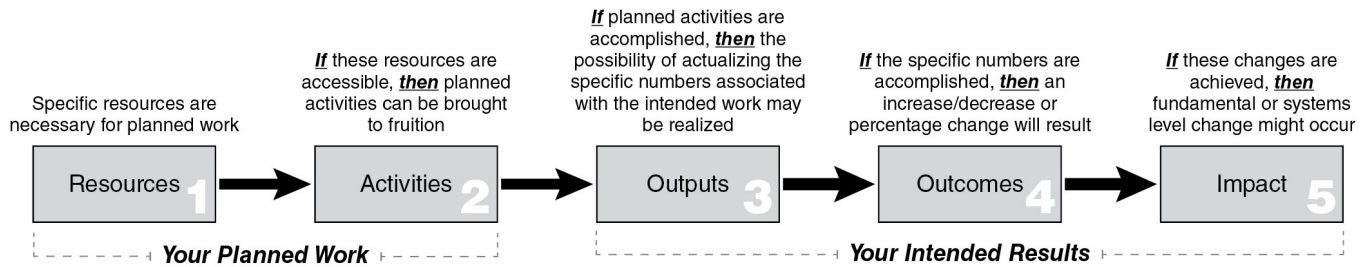
PERFORMANCE MEASUREMENT

- Performance measurement involves collecting and reporting data that can be used to summarize and assess the way a program is being implemented
- Performance measurement data are collected with some frequency and immediacy

114

114

LOGIC MODELS CAN BE USEFUL

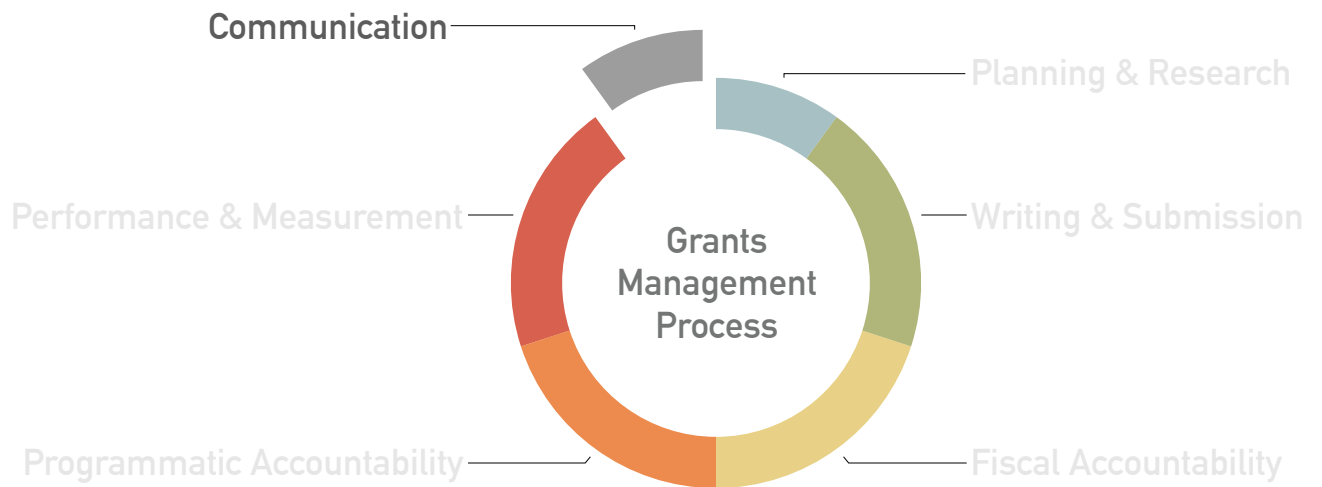


Madden, 2018

115

115

GRANT MANAGEMENT PROCESS: COMMUNICATION



116

116

GRANTS MANAGEMENT: INTERNAL & EXTERNAL COMMUNICATION

- ▶ Tell your story
- ▶ Newsletters
- ▶ Press Release
- ▶ Social Media
- ▶ Leverage your work
- ▶ Create internal and external champions

117

117

USE YOUR DESIGN TOOLS

www.canva.com

<https://www.mural.co/>

118

118

CANVA.COM

FUNDING
\$43,000
2 Foundation Grants
3 Contracts
4 Pending Requests

ECONOMIC DEVELOPMENT
4 Lots
3 Buildings
2 Reports

VISION | To provide equitable access to economic development support services for public, private, and non-profit stakeholders in order to increase the economic competitiveness of downtown Youngstown, Ohio as a leader in placemaking, redevelopment, and business retention, growth, and entrepreneurial support services.

MISSION | To provide the economic infrastructure and action to overcome capacity and resource gaps for the continued revitalization and investment in Downtown Youngstown.

VALUES | Our values are clustered in three focus areas - Economic Development, Entrepreneur Assistance, and Anchor Partnerships. It is through this focus that EAG will work to transform the center city of Youngstown, Ohio.

ECONOMIC ACTION GROUP

ENTREPRENEUR ASSISTANCE
1 Entrepreneur
4 Interns

ANCHOR PARTNERSHIPS
5 Partnerships
YNDC, TNP, WRPA, Landbank, TNP

Images demonstrate the use of using Canva.com as a design tool, showing how Canva templates may help share information about reporting and impact.

IMPACT BY DESIGN

REQUEST: As a successful black intrapreneur/entrepreneur in South Africa, there is so much that can be learned from your experience that would impact young people entering the workforce, nascent intrapreneurs/entrepreneurs, and provide significant insight for South Africans as well as others around the world. We are requesting up to 90 minutes of your time for an interview to understand your story and unique pathway so that others may join the ranks of success in these ever increasingly difficult times.



WHY? Intrapreneurs and the entrepreneurial spirit are critical success factors for professionals and serves as a viable strategy for individual development, career advancement, wealth creation, and pathways out of poverty as well as imperative for thriving and sustained economic development.

OBJECTIVE: Complete twenty (20) interviews with a variety of successful black intrapreneurs/entrepreneurs in South Africa. This work is critical, timely, and relevant. The findings from the lived experiences of intrapreneurs/entrepreneurs will facilitate the creation of insight for black millennials in South Africa and beyond, finding their way in the corporate workplace to ensure they move from surviving to thriving. This work will also provide other intrapreneurs/entrepreneurs critical insight on pathways to success. Finally, this work will serve as a key starting point for others across the globe to learn from black intrapreneurs/entrepreneurs in South Africa.



SIGNIFICANCE: This project will have an impact on intrapreneurs/entrepreneurs as well as millennials building their career pathways. Carice Anderson and Dr. Jennifer Madden are both African American females from the U.S. with extremely unique educational and work experiences. Both women have significant industry experience that will add to the richness of this project.

Carice L. Anderson holds an MBA from Harvard Business School (HBS) and is one of about 600 African American women who graduated from HBS. Carice has lived in Johannesburg since 2011. While in the U.S., Carice worked for powerhouse business consulting firms such as Arthur Andersen and Deloitte Consulting. In Johannesburg, Carice worked with two of the "Big Three" (the world's most prestigious management consulting firms) McKinsey & Company and Bain & Company. Carice also served as Head of Entrepreneur Development at the SEED Academy. Carice is the founder and current Leadership Consultant for Anderson Leadership Advisory.

Dr. Jennifer R. Madden holds a Ph.D. in Management from the Weatherhead School of Management at Case Western Reserve University. Dr. Madden is one of about 1,300 people of color who hold a Ph.D. in one of the Business disciplines in the entire U.S. Her new book, *Asian-Organizational Collaboration by Design* in the Routledge Critical Studies in Public Management Series, examines how successful collaborations overcome barriers to innovate and regenerate communities. Dr. Madden is currently an Assistant Professor of Management & Marketing and the Director of the Master (MSc) of Business Design & Innovation Program at Carthage College.



Next in the Capacity Building Training Series

10:00 AM to 11:30 AM

- Tuesday, July 30th — Grant Writing Toolkit
- Thursday, October 24th — Strategic Planning FUNDamentals
- Thursday, November 7th — Strategic Planning Toolkit
- Thursday, February 6, 2025 — Organizational Goal Setting
- Thursday, February 20, 2025 — Planning your Work, Working your Plan



Thank You!
Dr. Jennifer R. Madden

