

# **Nonprofit Toolbox Orientation Session 2019**





# What is a community foundation?

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Community foundations build and strengthen communities by making it possible for a wide range of donors to participate in creating permanent (and often named) funds to meet present and future needs.

The four roles of community foundations are:

- ◆ Donor services provider
- ◆ Grantmaker
- ◆ Convener
- ◆ Caretaker of resources



# Mission

The Community Foundation for Greater Atlanta leads and inspires philanthropy to increase the vitality of our region and the well-being of all residents.





# Five Impact Areas



Arts



Community  
Development



Education



Nonprofit  
Effectiveness



Well-being



# Building a relationship with the Foundation

## Organizational Profile

Information from a broad array of nonprofits and other types of organizations



## Common Grant Application

Allows for queries for competitive grantmaking, donor requests for information and partnership development



## Grant Application Supplement

Specific information from organizations for specific funding opportunities

# Questions?





# What is the Nonprofit Toolbox?

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- ◆ Nonprofit Toolbox awards are custom-designed management consulting packages to help solve a key organizational challenge or problem. (Not a cash grant.)
- ◆ Most awards provide 50-100 hours of consulting services.
- ◆ Organizations selected to receive a Nonprofit Toolbox award will work with a specialist from the Georgia Center for Nonprofits who will oversee the award and delivery of professional services to ensure the organization's stated outcome is reached within the designated time frame.
- ◆ Goal of the program: To strengthen nonprofit organizations' management, governance and operations.



# Changes to Nonprofit Toolbox in 2019

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- ◆ One Grant Cycle: Deadline is Friday, June 14, 2019 at noon
- ◆ Award Types: Supporting Strategic Planning and Board Development
- ◆ No required grantee contribution





# Opportunities

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**Strategic Planning:** An award in this area might include assistance with stakeholder interviews, conducting an environmental scan, outlining priorities/goals, defining strategies to implement goals and identifying ways to measure strategic plan goals.

Effective strategic plans should include the following characteristics:

- ◆ Evidence of an environmental scan, which includes assessing stakeholder and community needs and SWOT (strengths, weaknesses, opportunities and threats) analysis
- ◆ Planning that covers a longer period of time (generally at least two or more years) and includes quarterly, semi-annual or annual written assessment by staff and board to measure organizational progress toward goals
- ◆ Stakeholder participation, including input from staff, board and consumer/clients throughout development
- ◆ Clear goals, measurable objectives and annual work plans with assigned staff and/or board responsibilities
- ◆ Planning that takes into account and includes resources—costs and staff capacity—necessary to achieve objectives



# Opportunities

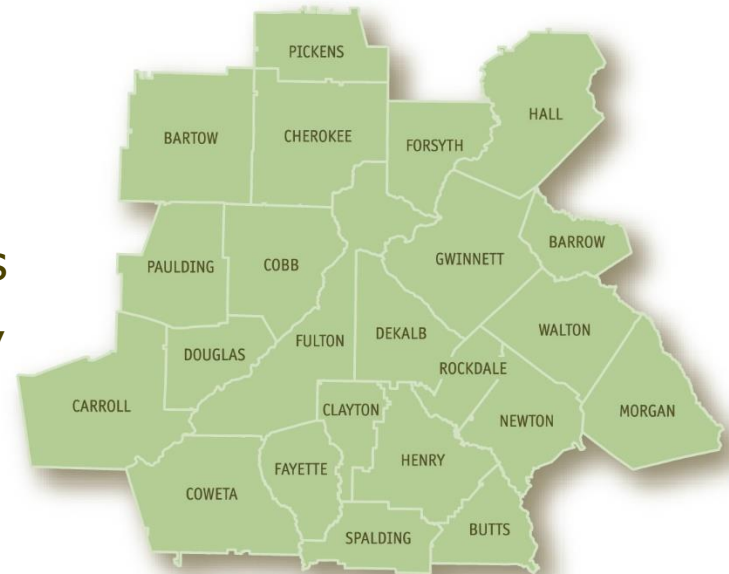
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***Board Development:*** An award in this area might include an assessment of the skills, expertise and diversity present or needed on the organization's board and the development of a strategy to recruit board members who fill the gaps. It could also include working with the board to clearly define its role and to develop committees and processes to fulfill its role..



# Eligibility Requirements

- ◆ Must be located and providing services within the Foundation's **23-county service area**;
- ◆ Must be classified by the U.S. Internal Revenue Service under Section 501(c)(3) of the IRS. code as a nonprofit, tax-exempt organization, donations to which are deductible as charitable contributions under Section 170 (c)(2), and the I.R.S. determination must be current;
- ◆ Must be registered with the Georgia Secretary of State as a nonprofit





# Eligibility Requirements

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- ◆ Must have a **minimum two-year operating history** after the date of receipt of its 501(c)(3) classification;
- ◆ Must have annual **operating expenses greater than \$75,000** as reflected in the most recently filed IRS Form 990
- ◆ Must have at least **one full-time paid employee** (paid minimum wage or more, working at least 35 hours per week, classified as a W-2 employee) for the 12 months prior to submitting an application (please note that contractors or consultants do not count toward this requirement); and
- ◆ Must have filed the end-of-grant report for any previous Nonprofit Toolbox award.



# Ineligible Organizations

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- ◆ Private and publicly funded schools (K-12) and institutions of higher learning. This does not include nonprofit charter schools;
- ◆ Organizations that exclusively raise funds for publicly funded schools (K-12), institutions of higher learning and government agencies;
- ◆ Organizations that require participation in religious services and/or religious education as a condition of receiving services; and/or
- ◆ Organizations that have discriminatory policies and/or practices on the basis of race, color, national origin, age, disability, sex/gender, marital status, familial status, parental status, religion, sexual orientation, genetic information or political beliefs.



# Ineligible Requests

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- ◆ Applications for consulting services that take place outside the grant period. Consulting contracts must be signed after the start of the grant period.
- ◆ Requests to work with a consultant that has a significant conflict of interest with the organization.
- ◆ Applications requesting cash grants to pay for staff salaries or expenses associated with infrastructure challenges.

# Questions?





# 2019 Schedule

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<b>Friday, June 14, 2019 at noon</b>	<b>Application deadline</b> <i>Complete applications include an Organizational Profile, Common Grant Application and Toolbox Grant Application Supplement</i>
<b>By August 16, 2019</b>	Applicants notified of funding decision
<b>September 2, 2019-October 30, 2020</b>	Grant period





# How to Apply

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- ◆ A complete application includes an Organizational Profile, Common Grant Application and a Nonprofit Toolbox Grant Application Supplement submitted through the Nonprofit Online Portal
- ◆ You can find a link to the Nonprofit Online Portal and documents relevant to the application process at [cfgreateratlanta.org](http://cfgreateratlanta.org)



# Grant Application Supplement

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- ◆ Describe the rationale behind your request
- ◆ Explain how consulting will address your needs
- ◆ Identify the project's anticipated outcomes and impact on the organization
- ◆ Describe any work that has taken place
- ◆ Identify barriers to success
- ◆ Identify resources available to implement the plan (people & funds)
- ◆ Tell us about your consultant if you have selected one

Make sure to review the application supplement instructions for additional tips! (link can be found in the guidelines)



# What makes a strong application?

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- ◆ Clearly define organizational challenges and goals
- ◆ Demonstrate readiness to embark on the solutions to issues and/or challenges
- ◆ Have board support for the project
- ◆ Demonstrate staff and board capacity to complete the project
- ◆ Exhibit organization-wide planning and decision-making in requesting support
- ◆ Demonstrate an understanding of how strategy can propel the organization
- ◆ Show clarity in mission and vision



# Additional Considerations: Prioritization of Applications

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While these are not requirements, organizations that meet the following criteria will be prioritized:

- ◆ Align with the Foundation's [Impact Area](#) metrics
- ◆ Are requesting support for strategic planning for the first time
- ◆ Are developing their first strategic plan
- ◆ Are located and providing services outside of Fulton, Cobb, DeKalb and Gwinnett counties (Note: All applicants must be located and providing services within the Foundation's [23 county service area](#))



# If awarded, how will it work?

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Foundation staff will notify organizations of their award status and connect the grantee with the Georgia Center for Nonprofits (GCN) Toolbox coordinator to begin the consulting engagement.

- ◆ The GCN Toolbox coordinator will schedule a meeting with your organization's lead staff members and board chair, where you will discuss the expectations for the project, the consulting engagement process, what to expect at the end of the engagement (report, plan, templates, etc.), examples of different styles or processes used by consultants and questions to ask when interviewing consultants.
- ◆ The grantee will work with the GCN Toolbox coordinator to identify an appropriate consultant. The grantee will contract for the mutually agreed-upon services that will include a project plan and timeline, specific outcomes stated in the award and a declaration of time commitment by all parties.

Grantees who want to work with a consultant outside of GCN's Nonprofit Consulting Group will still be required to work the GCN Toolbox coordinator on engagement expectations and Toolbox reporting. The GCN Toolbox coordinator may ask your preferred consultant for examples of past work before starting the project to better understand the consultant's style to better assist you throughout the project.



# Reporting Requirements

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Nonprofit Toolbox projects are considered completed when the identified project outcomes are met and evaluated. Depending on the project, it may take six to 12 months to complete the work. Nonprofit Toolbox recipients are required to complete two reports:

- ◆ **Within one month of project completion:** Grantees are required to submit an end-of-grant report (also known as an evaluation report). The report is utilized in assessing the immediate impact of the grant and the effectiveness of the Nonprofit Toolbox program and consultants.
- ◆ **12 months after project completion:** Grantees are required to meet with the GCN Toolbox coordinator 12 months following the completion of the Nonprofit Toolbox project to report on progress toward the project's long-term goals. This is required regardless of the consultant with whom the grantee contracted. A link to the report will be provided by the GCN Toolbox coordinator or Foundation staff.



# FAQs

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## **DO I NEED TO IDENTIFY A CONSULTANT TO WORK WITH BEFORE APPLYING?**

No. If awarded, the Georgia Center for Nonprofits' Nonprofit Toolbox coordinator will help you identify and select a consultant.

## **CAN I APPLY IF I HAVE ALREADY IDENTIFIED A CONSULTANT?**

The Foundation partners with the [Georgia Center for Nonprofits' Nonprofit Consulting Group](#) to implement Nonprofit Toolbox. Recipients are not required to contract with consultants associated with the Georgia Center for Nonprofits to complete their Nonprofit Toolbox project, however, most do. Nonprofits that identify their own consultant not affiliated with the Georgia Center for Nonprofits may receive up to \$15,000 in consulting services. Organizations may receive partial funding and should be prepared to supplement the Toolbox award with other funds. The Foundation will not pay for work already completed, consulting contracts that were signed before the start of the grant period or consultants that appear to have a strong conflict of interest with the recipient organization (i.e. consultant sits on the recipient's board).



# FAQs

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## **MAY I APPLY FOR MULTIPLE TOOLBOX AWARDS IN ONE APPLICATION DEADLINE?**

Organizations may only submit one Toolbox application per deadline. Strategic planning and board development work can be time intensive. For most organizations, it is best to have a current strategic plan before working on board development.

## **MAY I APPLY FOR A SECOND TOOLBOX IF I HAVE A CURRENT TOOLBOX GRANT OPEN?**

No, organizations must complete an end-of-grant report (also known as an evaluation report) for any previous Nonprofit Toolbox awards before applying.



# Questions?





# Additional Opportunities

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- ◆ Catchafire: An online platform to connect with skilled volunteers for assistance on over 100 technology, marketing and fundraising projects. Deadline: **May 15 at noon.**
- ◆ Learn more about Community Foundation grant opportunities here [cfgreateratlanta.org/nonprofits/available-grants/](http://cfgreateratlanta.org/nonprofits/available-grants/)



# Questions?

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## **For questions about the online application:**

- ◆ Anna Theodore, Grants Associate  
[ATheodore@cfgreateratlanta.org](mailto:ATheodore@cfgreateratlanta.org)

## **For questions about the grantmaking program:**

- ◆ Lauren Jeong, Program Associate  
[ljeong@cfgreateratlanta.org](mailto:ljeong@cfgreateratlanta.org)
- ◆ Hannah Klemm, Program Assistant  
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