IMPACT100 TRAVERSE CITY NON-PROFIT PACKET
2024 GRANT APPLICATION
April 2024

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WELCOME TO

impact.

TRAVERSE CITY

2024 Grant Application Training

Grant Review Team

**Mary Macey,
Nonprofit Liaison Chair**

**Tiina Maurey
Nonprofit Liaison Co-Chair**

**Shari van der Grijn
Grant Review Chair**

Zoom Overview + Guidelines

- Feel free to turn on your camera! We'd like to see your faces!

- On your Zoom pic, click on 'Rename' and put in your name and the organization you represent

- Please leave your mic muted until the Q&A session at the end

- Put your questions in chat - let's "Rock The Chat!"

- There will be a Q&A at the end

What is Impact100?

What is Impact100?

Impact100 is a successful global philanthropy model created in 2001 by Wendy Steele of Cincinnati, OH.

Her concept is **simple** and **powerful**: Gather a group of women together to each give $1,000, with the goal of significantly impacting local organizations in grants of at least $100,000.

Impact100 Traverse City's Mission

"**Women transforming our community through collective giving**."

We provide transformational grants in our five focus areas in our five-county region of **Grand Traverse**, **Antrim**, **Leelanau**, **Benzie**, and **Kalkaska**.

The **5** Focus Areas

The Five Focus Areas *Serving our five-county region*

Arts & Culture
Charitable initiatives that cultivate, develop, educate, and improve the cultural climate

Education
Charitable initiatives that further the ability to educate and improve education

Environment, Preservation, & Recreation
Preserve, enhance, revitalize, or restore facilities and surroundings

Family
Strengthen and enhance the lives of children and families

Health & Wellness
Positively impact mental or physical health and wellness

The Five Focus Areas (cont'd)

- Applicants identify which Focus Area(s) their initiative(s) fit by **ranking** the Focus Areas. Your initiative may fit within more than one focus area, but you must choose ONE as your top choice.
  - Your top choice should get a 1
  - Your bottom choice should get a 5
  - All others should fall in the middle

- We endeavor to honor your top choice of Focus Area selected, but will ensure that you are aligned to one of your top three.   Each applicant will receive a call from the Focus Area chair to which you've been aligned at the start of the review process.

- Please note that we cannot offer advice on how to rank the focus areas

Grant Eligibility Overview

Which Organizations are Eligible to Apply?

Applicants who would be receiving Impact100 TC grant funds (either as the recipient or as a fiduciary recipient with a co-applicant) must be:

- A **tax-exempt public charity** under **Section 501(c)3** of the Internal Revenue Code (or a non profit in partnership with entity that is 501(c)3).

- Operate in **Antrim, Benzie, Grand Traverse, Kalkaska,** or **Leelanau** counties.

- **Free of legal actions declared**: including current or pending conflicts

What Initiatives are Eligible for Funding?

Impact100 looks to fund initiatives that are both **transformational** and **sustainable**

To be considered for funding, Impact100 looks to have you meet our eligibility guidelines your initiative(s)

What Initiatives are Eligible for Funding? (cont'd)

The proposed initiative must meet **all** of the following requirements:

- Serve residents of and expend funds within our **five-county region**

- Be **transformational** and increase the breadth and depth of an organization through innovation, deepening, or expansion

  - ➤ **Innovation**: new program or capital project, or services delivered in a new way

  - ➤ **Deepening**: more services or the same provided more often to the current population

  - ➤ **Expansion**: expanding the service to a new population

What Initiatives are Eligible for Funding? (cont'd)

- Have a **total project budget of at least the full amount** of the Impact100 Traverse City grant amount (2023 = $113,000).

- Expend funds **within 24 months** of the award date, unless Impact100 Traverse City is promptly notified of timeline changes and approves an extension.

- Have a **plan for sustainability** beyond the grant award period, when Impact100 Traverse City funds are no longer available.

What Initiatives are <u>NOT</u> Eligible for Funding?

The following purposes or initiatives are deemed **<u>ineligible</u>** for funding:

- Debt reduction, operational deficits, operating expenses or overhead.

  (Note: operating funds may be requested if applicable to a *new* initiative/project to be funded and if the organization has a plan for sustaining the funding going forward past the Impact100 grant)

- Grants to individuals

- Endowment funding

- Interim or bridge funding

- Partisan, legislative or political activity

- Capital improvements or renovations to property for the grant project where the applicant organization may be denied access to at some point in time

- A project of an individual church, religious organization, or body of worship for its own benefit

A Complete Application is Required

In order to be considered for funding, applications must be **complete, include all of the required information and attachments and be submitted by the deadline**.

If an applicant fails to meet the aforementioned criteria, the application will not be considered for funding.

Writing Your Grant Application

Grant Writing Tips & Recommendations

- Craft a cohesive and compelling proposal

- While you're not "graded" on grammar and punctuation, your proposal's overall readability do affect the overall impression a reviewer may develop of your organization and the seriousness of your proposal

- PRO TIP - when you think you're done, have an outsider (not familiar with your organization and initiative) read your proposal; if they're confused by any part of it, we probably will be too!

Common Reasons for Declines

Related to Grant Application:

- Application **information lacking**; missing financial detail, simplistic project budget or timeline plan

- Impact of initiative **unclear,** who is impacted/underserved and how

- Needs of target community to be served **not well assessed** and/or investigated in support of the initiative

- **Inadequate or no plan** submitted to demonstrate how initiative will be sustained after the grant period ends

- Vision of organization and initiative were **not clearly articulated**

- Goals for the initiative were **vague,** evaluation process for determining the success of the project were **unclear**

- Initiative had been completed and grant funding was to **clear debt**

Common Reasons for Declines (cont'd)

Related to Funding:

- Grant would be dedicated primarily to **fund new staff** without concrete plan for managing staff cost after the grant ended

- Usage of grant funds was **unclear**, especially with larger projects with several funding sources

- Grant would fund over a **small portion** of the initiative; other funding sources needed for initiative success were **not yet committed**

Other:

- Initiative had **limited accessibility/reach** to the broader five-county region and/or the targeted community

- Initiative focus was **organizational not transformational;** organization may be transformational in nature but grant application was targeted for operational purposes

At stages with pink border, declines are sent via Submittable to Applicants* not moving forward

Process Overview - Review & Selection

1. Complete applications submitted will be assigned to one of our five **Focus Area Committees.**

2. The applications, including the financial information and attachments submitted with the application, are **read, reviewed and scored** by the members of the assigned Focus Area Committee.

3. Focus Area Committees will select Applications to move beyond the initial review to be reviewed by our **Finance Review Committee**, who will execute a deeper review on the provided financial information and conditions.

4. Applications passing financial review will then be scheduled for a **site visit** by the Focus Area Committees.

5. Focus Area Committes will select a **finalist** based upon all information gathered during reviews and the site visit.

6. Selected finalists are announced at the **Meet the Finalists** event.

7. **Finalist Executive Initiative Summaries** are then circulated to Impact100 Traverse City members in advance of the Annual Meeting.

8. At the **Annual Meeting**, representatives from each of the finalist organizations will provide a **ten-minute timed presentation** to our membership.

   a. Presentation order is randomly selected at the Meet the Finalists event

   b. After all finalist presentations are completed, members **rank vote** their selections for grant winners.

   c. **Grant winners** are announced at the conclusion of the Annual Meeting!

Conflict of Interest/Conflict of Loyalty

At Impact100 Traverse City, we want all Applicants to receive **a fair and transparent review** of their application. For this reason, we require the following:

- Every member of our grant review committees must acknowledge our **Grant Review Conflict of Interest and Loyalty policy** and attest they will abide by its terms, and disclose any real, potential, or apparent conflicts.

- Each Board Member must attest that they will abide by our Board Code of Ethics, Conflict of Interest policy, and Conflict of Loyalty guidelines.

- Upholding the integrity of our Grant Review process is of utmost importance; **proper safeguards will be implemented** in the event of any recognized conflict of interest or loyalty in accordance with policy.

Submitting Your Grant Application

Submitting Your Grant Application

- Impact100 Traverse City leverages **Submittable** for grant application submission and review

- Register for an account at www.submittable.com and become familiar with the platform (several videos available on YouTube)

- The account and its associated email address used to submit your application **will receive all official communications** regarding the status of your application, including questions or requests for additional information and official selection or declination notifications. **We recommend the submitter account be someone who will be monitoring the account and application for the duration of the review period.**

Submitting Your Grant Application (cont'd)

- Submittable does NOT save work as you progress.   Please use the **Save Draft** button often and at the end of a working session.

- Be sure the application is complete and includes all of the required information and attachments before using **Submit**.
    - Several portions of the application require you to submit attachments of financial information, including three years of financial reporting and financial details about your project initiative.

- Impact100 Traverse City is notified when applications are submitted in the Submittable application.

- Submission are **required** by 5:59PM on May 24.

Preparing for Grant Submission

- An information packet will be available April 10.   Content will include:
  - Today's presentation along with a recording of the session
  - 2024 Impact100 Traverse City Grant Application
  - Financial worksheet templates
  - Additional information on creating a successful grant application and key elements we're looking for within an application

- Applicants are strongly encourage to **fully read through the entire application and assemble content** before you begin to create the application within Submittable.

- All attendees will receive the packet via the email address at which they registered for the session.

- Information packet will be available on impacttc.org.

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Review of 2024 Impact100 Traverse City Grant Application

This could be you in September!

Question and Answer

These are questions posed by attendees during the sessions and our responses.

Q: Is there one award per focus area or could there be multiple in one of the focus areas?
A: There will be one finalist per focus area (may increase to two with 400+ members) and the award winners will be selected from that group of finalists by ranked choice vote of our members.

Q: Is an audited financial statement required or are reviewed or compiled statements accepted? Full audits are cost prohibited to small organizations.
A: At a minimum, we ask applicants to submit their 990's and corresponding financial statements. However, depending on the size of the non-profit, tax rules may not require a full 990. We won't deny an application if they aren't required to file a full 990 and only have management prepared statements.

Q: Will the webinars be available for viewing?
A: Yes. The link will be included in the packet we send out with the presentation as well as being available on the Grants page of our website.

Question and Answer

Q: If an organization is based outside the five county region, can we still apply?
A: If your organization serves our five county region, you can apply for a grant for an initiative in our region as long as it is for the sole benefit of the 5 county region.

Q: Can multiple people (Submittable users) contribute content in the grant submission or only a single sign in application process?
A: We encourage those within your organization to collaborate on completing the application. However, our Submittable license only allows a single user to create and submit the grant application.

Q: If our website is not fully developed, should we not apply for a grant this year?
A: We understand that organizations are at different stages of maturity. Your decision to apply should be based on the strength of your initiative. During the review process, questions posed back to you may give you valuable insight on where your website could be improved.   Keep in mind that several of our past grant winners where selected after a second submission.

Q: If the non-profit is mid-way through its fiscal year at the time of the application, does the "3 years of statements" refer to the 3 previously COMPLETED fiscal years?
A: Yes. Please provide your year-to-date and the prior 3 completed years of financial statements.

Thank you for attending

impact.

TRAVERSE CITY

2024 Grant Application Training

QUESTIONS? Email: grants@impacttc.org

Impact100 Traverse City 2024 Grant Application

Ends on Fri, May 24, 2024 6:00 PM

This year, a total of **x** (x**) grants** will be awarded in the amount of **$x each.**

Please read the following guidelines before you begin your application.

 Application Opens **April 25, 2024 at 12:00 pm** Eastern time
 Application Deadline **May 24, 2024 by 6:00 pm** Eastern time

Please note that the email address/account used for the submission of the application will receive all official communications from Impact100 Traverse City's Submittable account, including questions or requests for additional information via the Submittable platform and official selection or declination notifications. Thus, the submitter should be someone who will be monitoring the account and application for the duration of the review period.

Applicant Eligibility: In order to be eligible for a grant, applicants who would be receiving the grant funds either as the recipient or as a fiduciary with a co-applicant) must be:

- A tax-exempt public charity under Section 501(c)3 of the Internal Revenue Code
- Based in Antrim, Benzie, Grand Traverse, Kalkaska, or Leelanau counties.
- Free of legal actions declared: including current or pending conflicts

Initiative Eligibility: In order for an initiative to be eligible for funding, the proposed initiative must:

- Serve residents of and expend funds fully in Impact100 Traverse City's <u>five-county region</u> described above.
- Be <u>transformational </u>and increase the breadth and depth of an organization through innovation, deepening, or expansion

    Innovation: new program or capital project, or services delivered in a new way
    Deepening: more services of the same provided more often to the current population
    Expansion: expanding the service to a new population

- Have a total project budget for at least the full amount of the Impact100 Traverse City grant amount noted above.

- Expend funds within 24 months of the award date, unless Impact100 Traverse City is promptly notified of timeline changes and approves an extension.
- Rank our Focus Areas in order of applicability to the initiative.
- Have a plan for sustainability beyond the grant award period, when Impact100 Traverse City funds are no longer available.

Please note that the following purposes or initiatives are deemed <u>ineligible</u> for funding:

- Debt reduction, operational deficits, operating expenses or overhead. **(Note: operating funds may be requested if applicable to a *new* initiative/project to be funded by Impact100 Traverse City)**
- Grants to individuals
- Endowment funding
- Interim or bridge funding
- Partisan, legislative or political activity
- Capital improvements or renovations to property for the grant project where the applicant organization may be denied access to at some point in time
- A project of an individual church, religious organization, or body of worship for its own benefit

In order to be considered for funding, applications must be complete and include all of the required information and attachments. If an applicant fails to meet the aforementioned criteria, the application will not be considered for funding.

Grant Award/Reporting Period: The award/reporting period for this grant program is generally 15 months, beginning **November 1, 2024** and ending on **February 1, 2026**.

Funding Schedule and Reporting Requirements: Applicants who are awarded a grant will receive their initial distribution (typically 25% of the grant total) on **November 1, 2024**. The typical reporting/funding schedule for the rest of the cycle is as follows:

- February 1, 2025 - first progress report due; second distribution (25% of the grant total) will be released after the report is received
- May 1, 2025 - second progress report due; third distribution (25% of the grant total) will be released after the report is received
- September 1, 2025 - third progress report due; fourth distribution (final 25% of the grant total) will be released after the report is received
- February 1, 2026 - final progress report is due (note that if the funded project is not fully completed as of this date, grantees will be required to submit one or more additional reports following completion of the project)

The awarded funds must be used/expended within 24 months of the award date, unless an extension is otherwise granted by Impact100 Traverse City.

The aforementioned are guidelines and may be adjusted at Impact100 Traverse City's sole discretion depending on several factors, including but not limited to a grantee's particular situation. Each grantee will be required to sign a contract detailing their specific payment and reporting schedule before receiving funding.

Accommodations and Language Access: Grant funds may be used to support American Sign Language (ASL) interpreter services, language interpreters and translation services, or the purchase of adaptive equipment to support activities that help to ensure individuals with disabilities, Deaf and hard of hearing individuals and persons with limited English proficiency should have meaningful and full access to their programs, as related to the proposed initiative. For example, applicants proposing to use grant funds to create website, videos and other materials must ensure that they are accessible to persons with disabilities.

Review Process: The grant application process is competitive and all applications will be reviewed by Impact100 Traverse City members that volunteer to serve on our Grant Review committees. First, applications will be assigned to one of our five **Focus Area Committees**, which are:

- **Arts & Culture** - Charitable initiatives that cultivate, develop, educate, and improve the cultural climate
- **Education** - Charitable initiatives that further the ability to educate and improve education
- **Environment, Preservation, & Recreation** - Charitable initiatives that preserve, enhance, revitalize, or restore facilities and surroundings
- **Family** - Charitable initiatives that strengthen and enhance the lives of children and families
- **Health & Wellness** - Charitable initiatives that positively impact mental or physical health and wellness

The applications, including the financial information and attachments submitted with the application, are read, reviewed and scored by the members of the assigned Focus Area Committee. Applications that move beyond the initial review phase will then be reviewed by volunteer members of our **Financial Review Committee (FRC)**, with a deeper focus on the provided financial information and conditions. Once the FRC review is completed, the Focus Area Committees will then each select applications to move on for a scheduled **site visit**. Once site visits are completed, the Focus Area Committees will each select their finalist(s). The selected finalists are announced at the **Meet the Finalists** event. Finalist Executive Initiative Summaries are then circulated to Impact100 Traverse City members in advance of the Annual Meeting.

At the **Annual Meeting,** representatives from each of the finalist organizations will provide a short ten-minute presentation to our membership. Presentation time is subject to change and confirmed at the Meet the Finalists announcement. After all finalist presentations are completed, the winning grantees will ultimately be selected **by rank voting** from the membership. The winners will be announced at the conclusion of the Annual Meeting.

Visit **https://www.impacttc.org/grants/** for additional information about the Impact100 Traverse City Grant Application Process.

If you have remaining questions that are **not** addressed either above or at the weblink, please email: **grants@impacttc.org**. Specific questions pertaining to grant applications should not be sent to individual Impact100 Traverse City members directly, and will not be answered. Instead, please email such questions to the official Grant Review Committee email address above. Official responses from Impact100 Traverse City related to grant applications will be provided only through **grants@impacttc.org**.

** This project is NOT LIVE and not viewable by the public.

IMPACT100 TRAVERSE CITY'S 2024 Grant Application

I. GENERAL INFORMATION - APPLICANT AND PROPOSED INITIATIVE

Legal Name of Applicant Organization *

Limit: 300 characters

Enter the legal name of your organization. If applying in partnership with another organization, use the name of the lead applicant here.

Applicant Also Known As (if applicable)

If your organization is known by a name other than its legal name, enter that name here.

Initiative's Title *

Enter the name of the initiative here.

Are you proposing a Program Initiative, Capital Initiative or a combination of both? *

○ Program Initiative

○ Capital Initiative

○ Both

Initiative Focus Area

The next five questions relate to the Focus Area you believe most closely aligns with the initiative you are proposing.

Each Focus Area has a box under it into which you will enter a number - 1, 2, 3, 4, or 5.

1 is your TOP choice (best fits your initiative), **5 is your BOTTOM choice** (not a good fit for your initiative). YOU WILL USE EACH NUMBER ONLY ONCE; do not give the same ranking to more than one focus area.

Here is an **example** of what a completed ranking might look like:

Arts & Culture - 2

Education - 1

Environment, Preservation, & Recreation - 5

Family - 3

Health & Wellness - 4

While Impact100 Traverse City endeavors to honor the top choice Focus Area selected by the Applicant, such an assignment is not guaranteed.

Arts & Culture (rank 1, 2, 3, 4, or 5) *

Charitable initiatives that cultivate, develop, educate, and improve the cultural climate within Impact100 TC's five-county region.

Education (rank 1, 2, 3, 4, or 5) *

Charitable initiatives that further the ability to educate and improve education within Impact100 TC's five-county region.

Environment, Preservation, & Recreation (rank 1, 2, 3, 4, or 5) *

Charitable initiatives that preserve, enhance, revitalize, or restore facilities and surroundings within Impact100 TC's five-county region.

Family (rank 1, 2, 3, 4, or 5) *

Charitable initiatives that strengthen and enhance the lives of children and families within Impact100 TC's five-county region.

Health & Wellness (rank 1, 2, 3, 4, or 5) *

Charitable initiatives that positively impact the mental or physical health and wellness of the people within Impact100 TC's five-county region.

Applicant Submitter Contact Person *

Please note that the email address/account used for the submission of the application will receive all official communications from Impact100 TC's Submittable account, including questions or requests for additional information via the Submittable platform and official selection or declination notifications. Thus, the submitter should be someone who will be monitoring the account and application for the duration of the review period.

Submitter's Title *

Submitter's Phone Number *

🇺🇸 ⌄

Submitter's Email Address *

Do you have a secondary contact person? *

○ Yes

○ No

Applicant's Street Address *

[   ]

Applicant's City and Zip Code *

[   ]

In what county is the Applicant located? *

[   ]

Counties Applicant Serves (select all that apply) *

☐ Antrim

☐ Benzie

☐ Grand Traverse

☐ Kalkaska

☐ Leelanau

Applicant's Website *

[example.com   ]

Applicant's Executive Director/Chief Operating Officer *

[   ]

Applicant's Board Chair *

[   ]

How many board positions does the Applicant organization currently have? And of those, how many are filled? *

[   ]

List of Current Board of Directors *

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                        Choose File
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Upload a file. No files have been attached yet.

Acceptable file types: .pdf, .doc, .docx

Upload a list of your current board members in a doc, docx, or pdf.

Is this a co-application between two or more organizations? *

○ Yes
○ No

Does the Applicant carry general liability of director/officer liability coverage? *

○ Yes
○ No

If you answered "No" to the question above, please describe why not.

Limit: 50 words

Any pending litigation or recent judgments against the Applicant's organization? *

☐ Yes
☐ No

Is your organization currently involved in a lawsuit or any other legal proceeding, or has your organization had a judgment entered against it within the past 12 months?

If you answered "Yes" to the question above, please describe the pending litigation or recent judgment.

How many positions does the Applicant's organization staff? Specify how many are full-time and how many are part-time. *

How many active volunteers does the Applicant's organization have? *

ORGANIZATIONAL BACKGROUND AND HISTORY

The ORGANIZATIONAL BACKGROUND AND HISTORY section of the application includes the Applicant's Vision Statement; Mission Statement; Description of the Organization and its History; and, Description of the population(s) your organization serves.

Total points of the ORGANIZATIONAL BACKGROUND AND HISTORY section = 10 points.

Applicant's Vision Statement *

If your organization does not have a Vision Statement, state such in the area provided.

Applicant's Mission Statement *

Description of the Applicant's Organization, its History, and the population(s) it serves. (10 points) *

Limit: 750 words

Briefly describe your organization and its history. Include demographic information as appropriate. If your organization does not serve a specific population, describe what your organization serves.

II. NARRATIVE

The NARRATIVE section of the application includes the Applicant's proposed Initiative's Executive Summary; the Community to be Served; Needs of the Community to be Served; and, Gaps in Services.

Total points of the NARRATIVE section = 25 points.

Executive Summary (10 points) *

Executive Summaries should summarize the proposed initiative in 700 words or less. They should be written for a general public audience and provide a summary of the initiative, including who will be involved, what will be done, how the initiative will be transformational and impactful, where the proposed initiative will take place, and how the initiative will be sustainable. Applicants should NOT summarize past accomplishments in this section.

Community to be Served (5 points) *

Limit: 500 words

Describe the community(ies) to be served by this initiative, including the geographic location, the populations in the service area, including any underserved population in the service area.

Needs of the Community to be Served and Gaps in Existing Services (10 points) *

Limit: 750 words

Describe the needs of the community(ies) being served including the needs of any underserved population being served as a result of your proposed initiative. Include the impact of any previous efforts, gaps in existing services and how this proposal will initiate, continue, or enhance these efforts.

WHAT WILL BE DONE

The WHAT WILL BE DONE section of the application includes your proposed Initiative's Goals, Objectives, Outcomes, and Indicators; and, Planning and Implementation Timeline.

Keep in mind that your application must provide a clear link between the proposed activities and the needs identified in the "NARRATIVE" section above.

Total points of the WHAT WILL BE DONE SECTION section = 25 points.

Goals, Objectives, Outcomes, and Indicators (15 points)

Describe the goals, objectives, outcomes, and indicators of your proposed initiative, and, if applicable, how they are linked to current or similar efforts.

To differentiate between Goals and Objectives:

GOAL: a broad statement of what you wish to accomplish.

OBJECTIVES: Objectives support the goal(s) and provide more details. Objectives answer the question: When?

OUTCOMES: Include how the project and its impact will be assessed. Examples of outcomes are: changes in behavior or condition that reflect a positive impact.

INDICATORS: the specific, measurable information collected to track whether an outcome has actually occurred.

To help you create goals and objectives, consider the S.M.A.R.T. method: Specific, Measurable, Attainable, Relevant, Time-bound.

EXAMPLE:

Nonprofit: Literacy for All

Initiative provides literacy tutoring for youth.

Goal: To improve the academic performance of youth.

Objective: Literacy for All will develop and implement a 12-week literacy program for youth by December 2020.

Outcome: Students that received tutoring will improve their reading level.

Indicator: # of students are reading at grade level after the initiative compared to before.

Goals, Objectives, Outcomes, and Indicators *

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Limit: 1500 words

Enter your proposed initiative's Goals, Objectives, Outcomes, and Indicators here.

Planning and Implementation Timeline (10 points) *

Choose File

Upload a file. No files have been attached yet.

Acceptable file types: .pdf, .doc

Upload a planning and implementation timeline that outlines how your proposed initiative's Goals, Objectives, Outcomes, and Indicators will be accomplished within the 24-month grant cycle as a doc, docx, or pdf. A table is preferred.

III. WHO WILL IMPLEMENT THE INITIATIVE

The WHO WILL IMPLEMENT THE INITIATIVE section of the application includes the Key Individuals Involved in the Proposed Initiative; Key Individuals Involved in the Proposed Initiative; Organizational Capacity; Initiative's Fit with Your Organization's Current Strategic Plan; and the Sustainability of the Proposed Initiative.

Total points in the WHO WILL IMPLEMENT THE INITIATIVE section = 20 points.

Organizational Capacity and Key Individuals/Collaborators Involved in the Proposed Initiative (10 points) *

Limit: 500 words

Provide an overview of your organization's organizational and community capacity to successfully implement the proposed Initiative. Identify the key individuals and organizations involved in the proposed initiative. Provide a list of all key project personnel (names, if known, and titles) and describe the roles and responsibilities specific to the project activities, including the percentage of time each individual will devote to the initiative.
Here is where you should also list any collaborating organizations and their roles.

Initiative's fit with current strategic plan. (5 points) *

Limit: 250 words

Describe how your proposed initiative fits with your organization's current strategic plan. If your organization does not currently have a strategic plan, please explain why.

Sustainability of the Proposed Initiative (5 points) *

Limit: 250 words

Describe your organization's plan for the long-term sustainability of the proposed initiative beyond the grant period when Impact100 TC funds will no longer be available.

Provide an example of the organization's history of financially sustaining programs.

IV. FINANCIAL INFORMATION: BUDGET AND BUDGET NARRATIVE

The FINANCIAL INFORMATION: BUDGET AND BUDGET NARRATIVE section of the application includes:

 - Financial Summary Form

 - Initiative Budget Form

 - Initiative Budget Narrative

 - Additional financial information attachments such as the IRS 50(c) 3 Determination Letter; Audited Financial Statements; 990's; Interim Financial Statements; and, Current Year Operating Budget.

NOTE: You must use the Financial Information Form and Initiative Budget Form templates accessible via the link below. No other formats will be accepted for these two forms.

If you have any questions about these forms, please contact us at grants@impacttc.org (mailto:grants@impacttc.org).

The purpose of the forms is to assist members of Impact100 Traverse City in reviewing the proposed initiative, the financial health of your organization, and its capacity to effectively and successfully carryout the initiative described in your grant application. While it is intended to simply be a compilation of data from documents also required for submission with your application, we hope that your organization will also see this as a useful tool for monitoring its own financial health and trends.

Applicants must submit reasonable budgets based on the resources needed to implement the proposed initiative. The Initiative's budget should display a clear link between the specific project activities and the proposed budget items. It should not contain any items that are not detailed in the project narrative. The budget narrative must support all costs included in the budget and explain how the costs of goods and services are determined and how they will fulfill the overall objective of the project.

It is very important that the budget narrative be as comprehensive as possible and describe in a narrative format each line item requested in the budget.

Total points in the FINANCIAL INFORMATION: BUDGET AND BUDGET NARRATIVE section = 20 points.

LINK TO FINANCIAL FORMS: https://www.impacttc.org/grants/

Cut and paste this link into your internet browser to access the forms.

At this link you will find three (3) forms.

1) Sample Financial Summary Form

2) Financial Summary Form

3) Initiative Budget Form

Use the Sample Financial Summary form as a guide for what your completed Financial Summary Form should look like.

Once you click each form it will automatically download, allowing you to fill out and save the forms at your convenience before uploading them to this application.

Financial Summary

Please complete all shaded green boxes in the Excel spreadsheet. This information will summarize your financial position for a simplified analysis by our financial team. Please use your 990s & financial statements to complete this form. Additional instructions are included in the Financial Summary Form download.

Financial Summary Form *

```
Choose File
```

Upload a file. No files have been attached yet.

Acceptable file types: .pdf, .xls, .xlsx

Upload the Financial Summary Form as a pdf, xlsx, or xls here.

Initiative Budget

This document summarizes the sources and uses of the funds needed for your project. Additional instructions can be found on the attached Initiative Budget form.

Initiative Budget Form *

<div style="border:1px dashed #ccc; padding:40px; text-align:center;">

Choose File

</div>

Upload a file. No files have been attached yet.

Acceptable file types: .pdf, .xls, .xlsx

Upload your completed Initiative Budget Form as a pdf, xlxs, or xls here.

Initiative's Budget Narrative *

<div style="border:1px solid #ccc; height:150px;"></div>

Limit: 700 words

Provide a description of the proposed Initiative's budget in narrative form, addressing each line item and related timeline. The budget narrative should explain how the costs of goods and services in the budget were determined and how and when they will fulfill the overall objective of the project.

For example, the narrative could include a general statement regarding total cost and/or description of other sources of funding that may be necessary to fund the initiative if the total cost exceeds the Impact100 TC grant amount.

It is very important that the budget narrative be as comprehensive as possible, within the word limit.

IRS 501 (c) 3 Determination Letter *

<div style="border:1px dashed #ccc; padding:40px; text-align:center;">

Choose File

</div>

Upload a file. No files have been attached yet.

Acceptable file types: .pdf

Upload your organization's IRS 501 (c) 3 Determination Letter as a pdf here.

Audited Financial Statements *

<div style="border:1px dashed #ccc; padding:40px; text-align:center;">

Choose File

</div>

Select up to 3 files to attach. No files have been attached yet. You may add 3 more files.

Acceptable file types: .pdf

Upload the most recent three years of your organization's audited financial statements as THREE SEPARATE pdf FILES by year. Each year should be its own pdf.

If your organization is not required by the IRS to be audited, include three years of internal financial statements, again as THREE SEPARATE pdf FILES.

Is the Applicant organization required to file a 990? *

☐   Yes

☐   No

Interim Financial Statements *

Choose File

Upload a file. No files have been attached yet.

Acceptable file types: .pdf

Please include Interim Financial Statements (Statement of Financial Position and Statement of Activities) with Prior Year Comparison covering the period since the last available audit or filed tax return as a pdf.

Current Year Operating Budget *

Choose File

Upload a file. No files have been attached yet.

Acceptable file types: .pdf

Upload your organization's current year operating budget as a pdf.

Does the Applicant organization have access to an operating line of credit, cash, endowments, or other sources of working capital? If yes, please describe. *

CO-APPLICANT COLLABORATION

This section only applies to organizations who are co-applying with one or more organizations. If applying as co-applicants, a Memo of Understanding (MOU) is required and must include the the information outlined below.

If an Applicant is co-applying with one or more organizations and an MOU MUST BE INCLUDED.

IF AN APPLICANT IS CO-APPLYING WITH ONE OR MORE ORGANIZATIONS AND AN MOU IS <u>NOT</u> INCLUDED, THE APPLICATION WILL BE DISQUALIFIED.

The MOU should contain the terms of the partnership and the roles and responsibilities between two or more parties. The MOU must be signed and dated by the Authorized Representative of each proposed partner agency during the development of the application.

The MOU must:

· Clearly state the roles and responsibilities each partnering organization will assume to ensure the success of the proposed Initiative.

· Clearly demonstrate a meaningful partnership among MOU partners and a commitment on the part of all Initiative partners to work together to achieve stated initiative goals.

· Cleary state what collaborating organization will gain from this combined effort.

· Clearly state that each Initiative partner has reviewed the budget and is aware of the total amount being requested and the funding being requested for each initiative partner.

· Identify the individuals from each agency who will be responsible for implementing Initiative activities and describe how they will work with other initiative staff.

· Specify the extent of each partner's participation in developing the application. List the individuals involved in planning this proposal.

· Include the printed name, title, and agency for the Applicant and all required partners under each signature at the end of the attached MOU document.

☐ I agree with <u>Terms of Use</u> *

| Save Draft | Submit |

2024 Grant Timeline

- **April 1, 2024**
  - Membership deadline

- **April 3 and April 9, 2024**
  - Non-profit training, information packets available April 10

- **April 24, 2024**
  - The Big Reveal

- **April 25, 2024**
  - Grant application opens

- **May 24, 2024**
  - Grant applications are due on or before this date 5:59 p.m.

- **May 29 - June 28, 2024**
  - Grant applications are reviewed by focus area committees

- **July 1, 2024 - August 2, 2024**
  - Grant applications are reviewed by financial committee

- **August 5-16, 2024**
  - Focus area committees coordinate and complete site visits

- **August 28, 2024**
  - Finalists are announced at Meet the Finalists Event

- **Early September 2024**
  - Executive summaries are prepared and distributed to the membership

- **September 25, 2024**
  - Finalists present and members vote at the Annual Meeting, grant winners announced

- **October 2024**
  - Grant award contract agreements executed with grant winners

- **November 1, 2024**
  - Grantees receive initial 25% of their full grant payment

- **February 1, 2025**
  - Grantees receive 25% of their full grant payment, pending receipt of progress report

- **May 1, 2025**
  - Grantees receive 25% of their full grant payment, pending receipt of progress report

- **September 1, 2025**
  - Grantees receive final 25% of their grant payment, pending receipt of progress report

IMPACT 100 TRAVERSE CITY - INITIATIVE BUDGET FORM --------- Enter data in GREEN cells.

ORGANIZATION NAME	[Enter Name of Organization]
TIMELINE OF INITIATIVE	Commencement Date:
	Completion Date:

If your initiative will take longer than one year to complete, please be sure to include the total initiative budget costs for the entire period.

Modify REVENUE section to properly describe the revenue sources, insert rows, as needed.

Include the value of any In-Kind donations in revenue and the corresponding expense in the appropriate category to accurately reflect the total initiative cost and sources of support.

REVENUE	Committed	Pending	Total
Private Grants			
Impact 100		$ 100,000.00	$ 100,000.00
Revenue source description			$ -
Revenue source description			$ -
Government Grants			
Revenue source description			$ -
Revenue source description			$ -
Corporations			

IMPACT 100 TRAVERSE CITY - Financial Position Summary Form

		Enter Name of Organization

TIP: This form has been designed for you to easily compile information from your organization's three most recent years of financial statements and IRS Form 990 filings. Having the financial documents required for submission with your application readily available before beginning this form will assist you in compiling the information quickly and accurately.

Other information regarding this form:

Please include Interim 2024 financials along with a prior year comparison; If 2023 tax returns or audited financials are not completed, please include 2023 year-end financial information below - indicate if management prepared information has been provided instead of tax returns or audited statements. Please provide a full 3 years of tax returns, as applicable. If you have complete financials for years 2021, 2022 & 2023, there is no need to submit 2020 financials.

(1) NOTES: Please provide detail in this section that is necessary to explain differences year over year as well as one-time expenses/purchases/donations that would be useful for our anlaysis. Please use this space to explain anything that would not be clear from reviewing the financials.

INPUT DATA	2024 Year-to-date	2023 Comparable Year-to-date (prior year)	2023	2022	2021	2020	2023 vs. 2022	2022 vs. 2021	2021 vs. 2020	Notes (1):
Date of Interim Financials										
IRS FORM 990										
Fiscal Year End (Page 1, Box A)										
Formation Year (Page 1, Box L)										
Page 9, Part VIII Statement of Revenue, Column A										
Line 1c: Fundraising Events**	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	**
Line 1h: Total Contributions, Gifts, Grants and Other Similar	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Line 2g: Total Program Service Revenue	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Total Other Revenue	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Line 12: Total Revenue	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Page 10, Part IX Statement of Functional Expenses										
Column B, Line 25: Program Services Expenses	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Column C, Line 25: Management & General Expenses	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Column D, Line 25: Fundraising Expenses**	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	**
Column A, Line 25: Total Expenses	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	Total from data entered above from Part IX Columns B-D
Page 11, Part X Balance Sheet, Column B										
Line 16: Total Assets	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Line 26: Total Liabilities	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Line 27: Unrestricted Net Assets	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Line 28: Temporarily Restricted Net Assets	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Line 29: Permanently Restricted Net Assets	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Line 33: Total Net Assets	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	Total from data entered above from Part X Lines 27-29
Page 12, Part XI Reconciliation of Net Assets										
Line 3: Revenue less expenses (Change in net assets)	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	Total Revenue minus Total Expenses as entered above
Page 12, Part XII Financial Statements and Reporting										
Line 2b: Were the financial statements for the fiscal year audited? (Yes/No)										Select response from drop down menu
**If Fundraising Expenses are greater than Fundraising Revenues, please include a detailed explanation:										
ANNUAL FINANCIAL STATEMENTS										
General Information										
Enter information as indicated by your response above.	NA	NA	Enter Audit	Enter Audit	Enter Audit	Enter Audit				
Select audit opinion from list, if applicable.										Select response from drop down menu
If anything other than an unqualified opinion was received, please explain in more detail below:										
Balance Sheet										
Current Assets Total	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Current Liabilities Total	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	
Net Liquid Assets	$ -	$ -	$ -	$ -	$ -	$ -	0.0%	0.0%	0.0%	Current Assets - Current Liabilities
FINANCIAL PERFORMANCE RATIOS										
Program Services as % of Total Expenses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	Program Services Expenses / Total Expenses
Management & General Administrative as a % of Total	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	Management & General Administrative Expenses / Total Expenses
Fundraising as a % of Total Expenses	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	Fundraising Expenses / Total Expenses
Fundraising Efficiency	-	-	-	-	-	-	0.0%	0.0%	0.0%	Fundraising Expenses / Total Contributions, Gifts, Grants and
% Unrestricted Net Assets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	Unrestricted Net Assets / Total Net Assets
Liabilities as % of Unrestricted Net Assets	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	Total Liabilities / Unrestricted Net Assets
Months of Expenses Covered by Net Liquid Assets	0.0	0.0	0.0	0.0	0.0	0.0	0.0%	0.0%	0.0%	Net Liquid Assets / Average Monthly Expenses
Liquidity Ratio (Target > 3)	-	-	-	-	-	-	0.0%	0.0%	0.0%	Current Assets / Current Liabilities
Defensive Ratio (Target > 3)	-	-	-	-	-	-	0.0%	0.0%	0.0%	(Unrestricted + Temporarily Restricted Net Assets) / Average Total
Debt Ratio (Target < 0.3)	-	-	-	-	-	-	0.0%	0.0%	0.0%	Liabilities / Assets

(1) If there is any other information that will help us to better understand your organization's financial position during the periods reported, please provide it below:

Impact 100 Traverse City Grant Eligibility Guidelines

All Organizations applying to Impact 100 T.C. must be/have the following:

- Tax-exempt public charity under Section 501(c)3 of the Internal Revenue Code
- Based in Antrim, Benzie, Grand Traverse, Kalkaska or Leelanau counties
- Be free of legal actions declared: including current or pending conflicts

Initiatives Eligible to apply for the Impact 100 T.C. grant must:

- Serve residents of and expend funds fully in the 5 counties listed above
- Be a new program, capital project, or expansion of an existing program or a new or expanded collaboration effort of several non-profit organizations
- Have a total project budget for the full Impact 100 available grant
- Expend funds within 24 months of the award date or notify Impact 100 T.C. of timeline changes
- Designate one of the following focus areas: 1) Arts & Culture 2) Education 3) Environment , Recreation, & Preservation 4) Family 5) Health & Wellness
- Grant applications must have a plan for sustainability

The Following are deemed Ineligible:

- Debt reduction, operational deficits, operating expenses or overhead. **(note: operating funds may be requested if applicable to a new initiative/project to be funded by Impact 100)**
- Grants to individuals
- Endowment funding
- Interim or bridge funding
- Partisan, legislative or political activity
- Capital improvements or renovations to property for the grant project where the organization may be denied access to at some point in time
- Is a project of an individual church, religious organization, or body of worship for its own benefit

Impact 100 Traverse City Transformational Initiatives

Transformational Initiatives should increase the breadth and depth of an organization. Impact 100 TC seeks to assist organizations in transitioning to a new level and ensure that the growth is sustainable.

- Innovation: Delivering existing services in a new way
- Deepening: Providing existing services more often to current population
- Expansion: Expanding services to a new population

Transformation Initiative	vs.	Basic Request for Funds
Solves a problem/Impacts Community		Helps with existing mission
Pursues Change		Is centered on organizational needs
Is visionary		Fills a daily need (i.e. fundraising)
Is Innovative/Has good leadership		Focuses on actions, not outcomes

Grant Writing Tips and Recommendations

Develop a common grant application library.

Although it is often the nature of the beast, try not to wait until the last minute to prepare your application.

Prepare application as a Word document to utilize character count function. Then copy and paste into application.

Write the Executive Summary last.

Frame your language as what your beneficiaries need, not what your organization needs.

Work with your program staff to be sure your information is up to date and relevant. They can also provide you with anecdotes and client testimonies that you might not otherwise have.

Don't assume the reader is familiar with your community or organization; or that the need you are trying to address is well known.

Don't use industry jargon, don't assume the reader knows what you're talking about. Spell out acronyms upon first use, no matter how common. CMD?

Whenever possible, use data to support your points.

Use personal stories as examples of your points.

Don't get too "salesy" – reviewers see right through it.

Train yourself to clearly and thoroughly answer the questions presented. Your best resource is a grantmaker's own guidelines. A literal reading and interpretation of grant guidelines is one of the most practical measures you can take. Go so far as to repeat the question in the answer.

Strive to appreciate the time of the person or persons reading the request. Concise, to the point requests without a lot of "flowery" prose about the topic show professionalism and respect for the grantmaker's time.

Convince the reader you are THE expert in solving the problem you are trying to address. And that your organization is uniquely positioned to do so.

Budgets communicate the priorities of the organization. Make sure your budgets and your proposal narrative tell the same story. Don't assume that budget expenses are self-explanatory.

Don't send a lot of "fluff" attachments. Grantmakers will specify what to send. Don't send more than requested. In the case of Impact 100 TC, provide annual reports, media clips, newsletters, etc. during the site visit.

Have someone not familiar with the project review the grant before submittal.

When you are turned down for a proposal, maintain sincerity and interest with a thank-you letter.

Impact100 Traverse City Declination Summary

We greatly appreciate the noble and hard work that our nonprofit applicants are doing in the communities that we serve. We consider it a privilege to receive and review the applications submitted each year. Because the composition of our full membership and individual committees, and the specific needs and priorities of the communities we serve, may change from year to year, Impact100 Traverse City does not provide individualized feedback on applications.

Based on general feedback from our Focus Area Committees from previous grant cycles, Impact100 Traverse City has compiled a summary list of common reasons why an initiative may be declined for Impact funding:

Related to Grant Application:
➢ Application incomplete
➢ The grant application did not relate to the budget provided
➢ Budget was unclear and/ or provided too little detail
➢ Impact of initiative unclear
➢ Funding request is for ongoing operational costs rather than a transformational project
➢ Inadequate data to support the need for the initiative
➢ Needs were not well assessed and/or investigated
➢ The non-profit failed to provide a plan for sustainability/funding/succession after the grant funding period
➢ Vision was not clearly articulated
➢ Evaluation process for determining the success of their project was unclear
➢ Vague goals and missing financial statements

Related to Funding:
➢ Project funding was dedicated primarily to staff salaries, but there was no concrete plan for covering that cost after the grant period
➢ Project funded debt for capital already spent
➢ The plan for usage of Impact funds was unclear, especially with larger projects with several funding sources
➢ The applicant had extensive access to other funding sources; need for funds not evident
➢ The Impact funds, if awarded, would only be a very small part of the overall initiative budget; other funding sources needed for initiative success were not yet committed

Other:
➢ Based on lack of operational history and documentation (e.g. had not yet filed a 990), it was unclear whether the applicant could manage a grant of this size.
➢ Sustainability of the initiative was a concern
➢ The initiative had limited accessibility/reach to the broader region
➢ The initiative was more organizational than transformational
➢ The project had already started
➢ While the overall mission of the organization appears to be transformational, the specific portion of the project that the Impact grant would fund is not transformational.