STRENGTHENING YOUTH PROGRAMS IN INDIANA

Grant Summit

Tami Silverman, P/CEO
Jennifer Darby, COO
Are you joining us for a SYPI Local Grant Clinic? Sign up now!

- March 28 | Kokomo
- March 29 | Muncie
- March 31 | Bloomington
- April 3 | Evansville
- April 4 | Scottsburg
- April 5 | South Bend
- April 10 | Hammond
- April 12 | Indianapolis
- April 13 | Kendallville
- April 14 | Virtual

Register at iyi.org/events
The 2023 Kids COUNT® Data Book is available!

Visit iyi.org
Developing an Award Winning Case Statement for Support

Strengthening Youth Programs in Indiana
Regional Grant Summit

Kim Donahue
Newgrange Consulting
What does a movie trailer for the latest superhero movie have in common with a case statement?
ASSESSING THE NEED

✓ What is the need you will address?
✓ How do you know that there is a need?
✓ Where can you find facts and statistics that support your case?
  ✓ Community assessments (health, economy, poverty statistics)
  ✓ Census statistics
  ✓ School district statistics
EVALUATING THE PROJECT

✓ How will you answer the question “So what?” (outputs vs. outcomes).
✓ Tangible and intangible
✓ How will attendance, surveys, observation, interviews, journaling, self-evaluation show results?
✓ What other ways can you evaluate your project?
HELPFUL HINTS FOR YOUR PROPOSAL

✓ Make the case with enthusiasm!
✓ Provide exactly the information asked for.
✓ Use plain language.
✓ Explain acronyms that you use.
✓ Do all your writing in a separate document that you can cut and paste into the application.
MORE HELPFUL HINTS

✓ Be concise and proofread multiple times.
✓ Have someone from “outside” read your proposal.
✓ Remember that the actual proposal narrative must be uploaded as a single document (no more than 8 pages).
GET STARTED RIGHT NOW

Today you will

• review what needs to be in each of these short case statements.

• put your answers to the questions in an outline or bulleted list before you write.

• write the 200 word short descriptions for the application that summarize your organization and the project.

• write your answers in paragraphs.

• count words to edit or expand.
For many years, the Endowment has been committed to helping foster the healthy development of Indiana youth by supporting the programs of community-based organizations that enhance and complement what youth learn and experience in their homes and schools. The Endowment has funded youth-serving organizations whose programs focus on child protection, academic success, social development, leadership, character development and other purposes. The Endowment has been especially interested in supporting programs that help youth and families that face compelling challenges. It has been important to the Endowment that these youth-serving organizations are strong, well-led, collaborative and engaged in best practices and that their youth-development professionals are well trained and supported so they can effectively serve Indiana youth.

The Endowment recognizes that the work of Indiana’s youth-serving organizations has become even more essential to youth, families and communities in light of the academic, social and physical tolls exacted by the COVID-19 pandemic and other societal challenges. These factors have made the work of youth-serving organizations more complex and demanding. Unfortunately, many youth-serving organizations are finding it difficult to staff programs to fully meet demand, provide timely professional development for their staffs, develop new programs that are responsive to emerging needs of youth and raise funds to support their youth programs.
Developing Your Program Description
Consider these questions when developing your program description:

Who are you?
- Your history (longevity, importance, reputation)
- How do you fit into the community?
- Your key services and programs, number of youth you serve, record of success (outcomes), awards, recognition
- Why are you successful?

When do you do what you do?
- Program duration (days per week, hours, intensity)

What special populations do you serve?
- Populations you serve - - youth from low income households, from communities of color or immigrant populations, youth who lack adult supervision and protection or who been exposed to trauma or other adverse childhood experiences.
Summarizing Your Funding Request
Summarizing your funding Request:

What area(s) will you address (program, capacity, capital)?
• One area or more than one?
• What is the amount of support you are requesting?

What need will you address?
• Summarize local demographic and statistical data that prove that there is a need to be addressed.

What strategies/activities will you use?
• Summarize what you will be doing to accomplish your goals.
• What will this do for youth? IMPACT!

What is the timeline for this project?
• Realistic estimate of the time this will take.
Fall 2023...
Girl Scouts receives $15M grant to address girls’ needs in Indiana

A private, family foundation since 1937

Lilly Endowment Inc. (the “Endowment”), is pleased to propose the grant described below, subject to the following General Conditions and any Special Conditions or other Special Terms:

ARTICLE I
DESCRIPTION OF GRANT

Grantee (name and address): Girl Scouts of Central Indiana Inc.
Leadership and Learning Center
7201 Girl Scout Lane
Indianapolis, IN 46214
ATTN: Ms. Danielle Shockey

Grant Number: 20191063 *

Amount of Grant: $7,500,000
Fall 2023...
What will the title say in your local newspaper?
Fall 2024-Fall 2027
Sustainability vs. Future State
1. In reviewing applications and determining funding recommendations, Endowment staff will take into consideration the extent to which the organization has **DEMONSTRATED** the following:

*It has the ability and commitment to sustain programming and impact after funds from a grant are expended.*

2. A plan for sustaining any proposed efforts that will require ongoing support. The organization should clearly describe its ability and commitment to sustain programming and impact after funds from a grant are expended.
DEMONSTRATED clearly show the existence or truth of (something) by giving proof or evidence

PLAN a detailed proposal for doing or achieving something

ABILITY talent, skill, or proficiency in a particular area; possession of the means or skill to do something

COMMITMENT the state or quality of being dedicated to a cause

IMPACT have a strong effect on someone or something
SUSTAINABILITY is...

“Obtaining/maintaining funding to keep the program running” (PROGRAMMATIC)

AND

“Perpetuating the results that are being achieved so that they become the organizations’ new way of work and improved outcomes become the norm” (IMPACT)

SO...

What will you need if in the future state your organization is to achieve both?
How will you demonstrate both the organizations’ ability and commitment to a future state of greater impact in the sustainability plan section of application?
<table>
<thead>
<tr>
<th><strong>ability</strong></th>
<th><strong>commitment</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizational fiscal historical strength</td>
<td>Strategic planning plan/metrics of success achieved, or path to achieve or evidence of ways your organization in growing or has grown capacity</td>
</tr>
<tr>
<td>Organization fiscal trends if moving in positive direction</td>
<td>Evidence of ways your organization in growing or has grown capacity</td>
</tr>
<tr>
<td>Data illustrating mission goals/outcomes</td>
<td>Similar past grants/results that illustrate ability to sustain beyond grant or specific grants that align for future opportunity you will seek.</td>
</tr>
<tr>
<td>Growth translates into fees/sales/new sources for revenue</td>
<td>Property investments- identify future costs, feasibility for organization to integrate into existing operations</td>
</tr>
<tr>
<td>Identify similar success model how you are replicating</td>
<td>Your commitment- but also the community need/commitment to support, the client's commitment to you</td>
</tr>
</tbody>
</table>
Could this be a response for SUSTAINABILITY?
The growth of membership/families/youth will result in program fees...

*mental health program being started...eventual Medicaid/care could be a source of income.

*membership growth translates to camp registration, program fees, cookies sales.
The program is not sustainable, but the results/outcomes are...

*program may not be, but outcomes can...staff will have received training that will continue to benefit

*clients involved will have received tool/support/training and no longer require involvement.
New roof/windows/insulation in capital improvement will save $$... $$ will be used to fund new program...
We will seek more grants...

*We will seek more grants... list specific past funders that would be potential to support.

*corporate partners

*community need illustration
<table>
<thead>
<tr>
<th>Section</th>
<th>Information</th>
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</thead>
<tbody>
<tr>
<td>Timeline Section</td>
<td></td>
</tr>
<tr>
<td>Budget</td>
<td>Up to 3</td>
</tr>
<tr>
<td>Letters of Support</td>
<td></td>
</tr>
<tr>
<td>Supplemental Information</td>
<td>Up to 10</td>
</tr>
<tr>
<td>Narrative</td>
<td>Head on...explanation...what is the plan? Details/proof/data</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Timeline</strong></td>
<td>When will you implement sustainability strategy? Does it grow over life of grant funding period? Ex: Member = fees yr. 1 XXXX, yr. 2. XXX OR decrease year 1. full FTE salary</td>
</tr>
<tr>
<td><strong>Budget/Budget Narrative</strong></td>
<td>Plan will have true costs...but what about related impacts/costs...important to identify/account for...stuff that sneaks up on you. Ex: FTE (tech &amp; tech licenses, increased mileage, prof. deve costs)</td>
</tr>
<tr>
<td></td>
<td>If seeking program or property grant...consider other organizational capacity needs and include TRUE costs here.</td>
</tr>
<tr>
<td><strong>Letters of Support</strong></td>
<td>From funders</td>
</tr>
<tr>
<td></td>
<td>From community influencers</td>
</tr>
<tr>
<td></td>
<td>From clients, consultants, peers</td>
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<tr>
<td><strong>Supplemental Information</strong></td>
<td>Data on past success/impact</td>
</tr>
<tr>
<td></td>
<td>Research/data to support your project based on existing model</td>
</tr>
<tr>
<td></td>
<td>Feasibility and plan for ability to maintain</td>
</tr>
</tbody>
</table>
Discussions
Thank You

Danielle Shockey
dshockey@girlscoutsindiana.org
NONPROFIT BUDGETING

Objectives

• Increase your understanding of the basic terminology and concepts related to nonprofit budgeting.
• Increase your knowledge of the budget development process.
• Provide tips, tools and resources to assist in your budget development process.
Budgeting is the process of planning, organizing, and controlling financial resources and how they are allocated to achieve organizational goals.

A budget is foundational to any organization’s operation. Understanding the true cost of executing your mission is a critical piece to maintain long-term sustainability.
ANNUAL BUDGET

Make wise choices together!
What are our spending priorities?

Where are our goals for this year?
**Terminology**

**Income** is the money or goods that a person or entity receives for their labor, products, or factors of production over a period of time.

1. **Unrestricted income** that the organization obtains in support of its particular cause or mission (such as individual donations, bequests, government or foundation grants).

2. **Restricted income** is recognized for use when the funder/donor designated restriction (time or purpose) has been met. For example, program expenses are restricted fund or naming rights to a building are restricted funds.

3. **In kind** refers to goods, services, and transactions not involving money or not measured in monetary terms.
4. **Reserves** are unrestricted cash that is available as a cushion against unexpected events, losses of income or significant unforeseen expenses.

5. **Expenses** are the cost of operations that a company incurs to generate revenue.

6. **Budget Narrative** explains how the costs were estimated and it justifies the need for the cost.
NONPROFIT BUDGETING
Define your programs and priorities.
Determine accounting structure for monitoring and administration.
What are your fixed and variable costs.
Estimate how much each will cost.
Allocate staff salaries, taxes and benefits.
Confirm your estimation of fixed expense.
Identify program sources to fund and general income items.
Confirm your estimation of variable costs.
Estimate fundraising costs.
When done with the draft of the budget, present it for board approval.
NONPROFIT BUDGETING

Expenses
**Personnel**

Who are the people necessary to execute the organizations mission?

- **Executive Director** $85,000
- **Program Director** $65,000
- **Program Coordinator** $55,000
- **Therapist** $30,000
- **Administrative Assistant** $50,000
- **Contractors** $38,000

- What is staff’s individual current salary and what raises do we want to offer?
- Do we or want to offer benefits and what are those costs?
- What personnel are covered by grant funds?
- What does the accountant or CFO say?
Nonpersonnel

- Rent
- Utilities
- Phone
- Printing
- Postage
- Website Maintenance
- Equipment
- Office Supplies
- Travel
- Fundraising
- Memberships
- Professional Development

Expenses
Grants
- Restricted (Program grants or restricted individual donor gift)
- Cost Reimbursement
- Cost disbursement
- General Operating (Individual or foundation grants that support administrative costs)

Corporate Giving
- Company
- Foundation

Individual Donors

Major Gifts
- Donation from individual or corporation that meets a specific threshold set by the organization.
NONPROFIT BUDGETING

Sources of Revenue

Special Events
- When will funds be received
- Sponsorship
- Ticket sales and silent auction

Inkind
- Donated products or services

Fee for Service/Contracts
- Program fees
Reminder
1. Establish your funding priorities.
2. Analyze your most recent year’s financial activity.
3. Create a budget checklist with timeline.
4. **Revenue**-Be realistic, Have a Plan B, Look at EACH source of revenue to determine if it makes sense and TAKE your TIME!
5. **Expenses**-Be realistic, REVIEW personnel costs first, involve others, base DECISIONS on performance, be DETAILED in the process and be PATIENT during the process!

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THANK YOU!

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