Get Ready for Grant Success

RGV Nonprofit Summit

October 30, 2024

Betsy Cox

Texas Department of State Health Services

Overview

- Organizational Readiness
- Planning Your Project
- Researching Good Fit Funders
- Q&A

Getting To Know You

MISSION FOCUS?

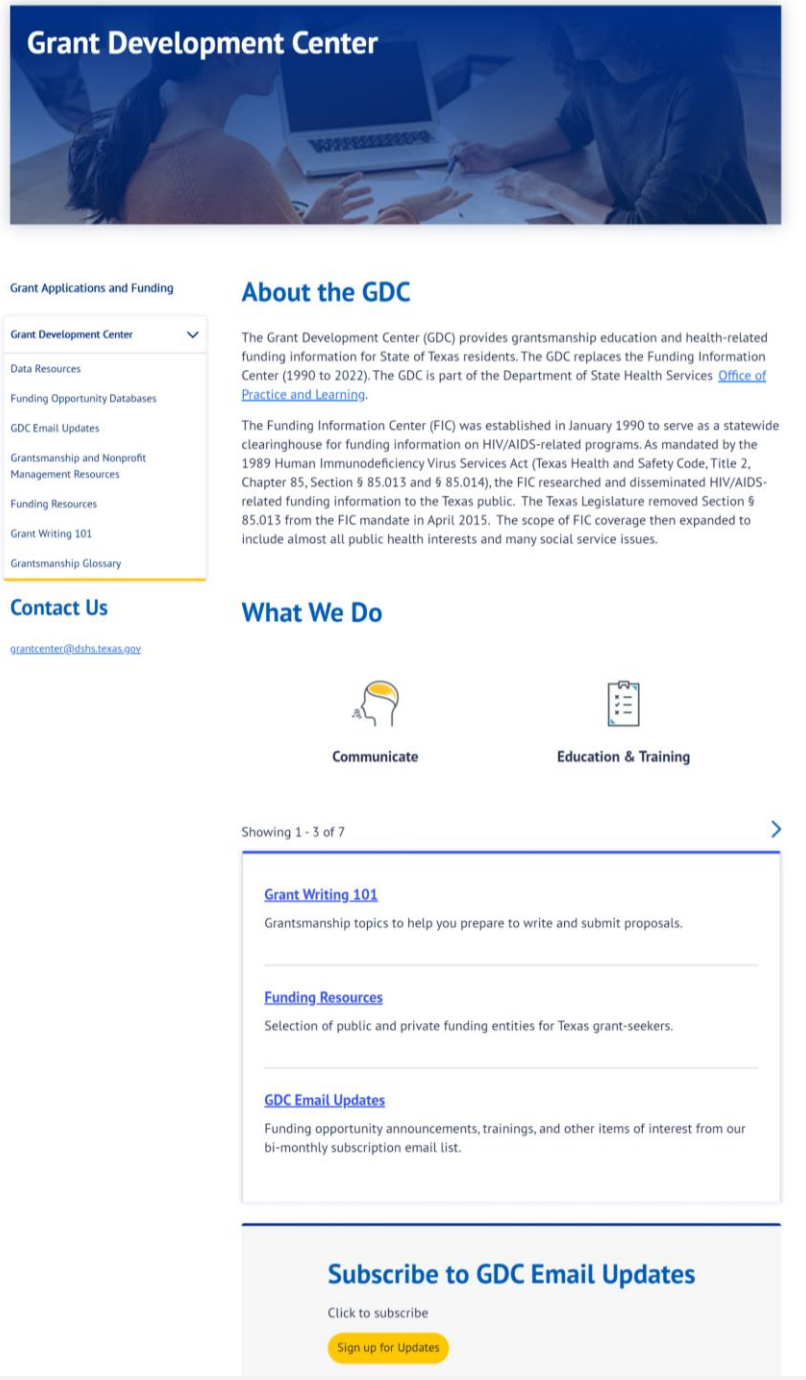
YEARS OF HISTORY?

GRANTS EXPERIENCE?

DSHS Grant Development Center

- Grant Writing 101
- Grantsmanship & Nonprofit Management Resources
- Grantsmanship Glossary
- DSHS Data Resources
- Funding Resources
- Funding Opportunity Databases
- GDC Email Updates

dshs.texas.gov/grant-applications-funding/grant-development-center



Organizational Readiness

Grant Process

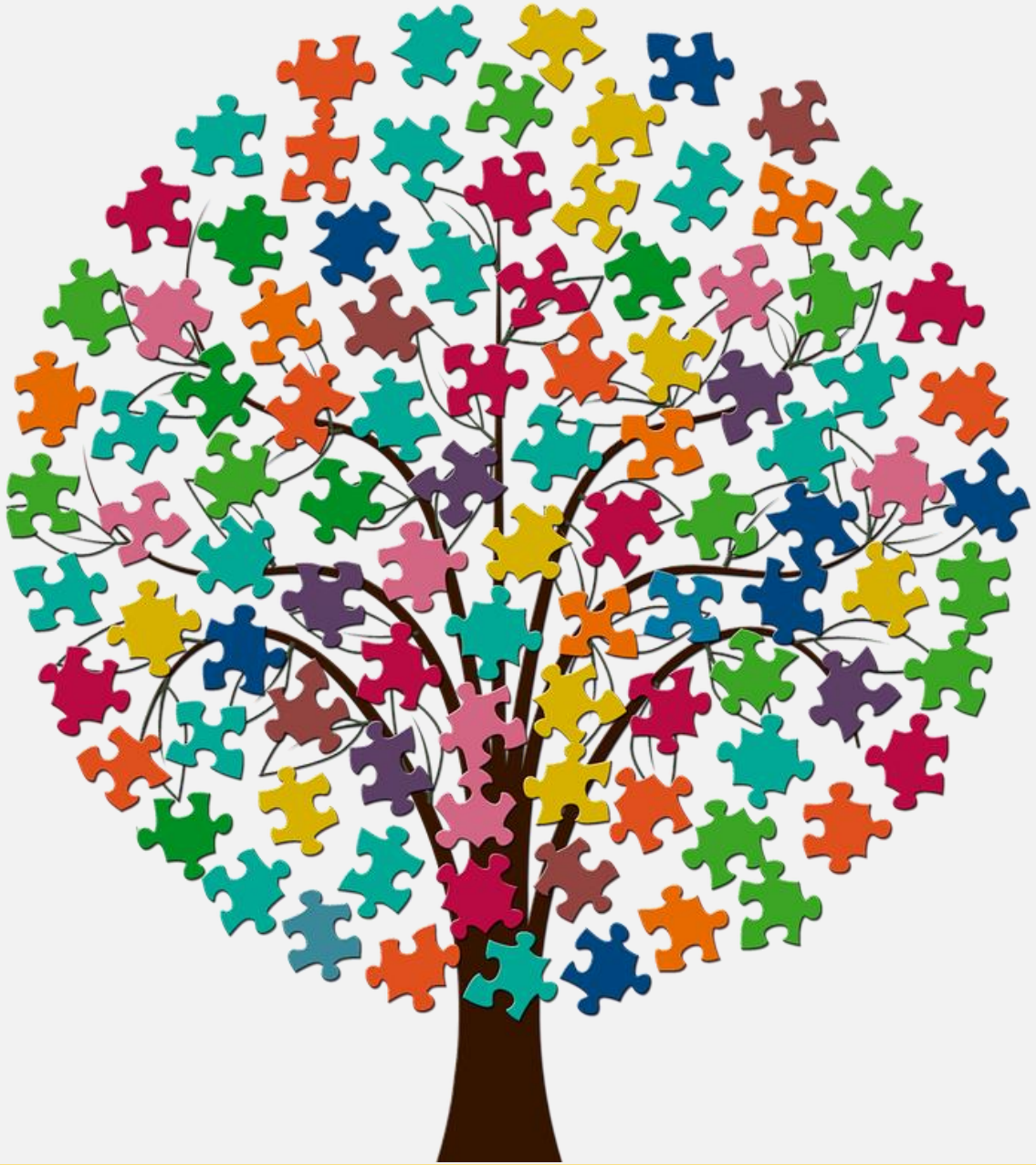
80% Planning

- Readiness
- Research
- Relationships
- Writing
- Reporting

Resource Development

Your Grant Story

- Multiple Revenue Streams
  - Grants & Contracts
  - Events & Fundraisers
  - Individual Giving
  - Earned Income
  - In-Kind Donations
- Annual Budget – Grants
- Grant Decision-Making
  - Opportunities to Pursue?
  - Priority Funding by Program?
- What Are Your Biggest Challenges?



Toolbox Documents

Get Organized

Organizational

Articles of Incorporation

Board & Executive Bios

IRS 501(c)(3) Letter

Mission Statement

History

Strategic Plan

Annual Report

Social Media/Videos

Financial

990 Tax Form

Audited Financial Statement

Boilerplate Language (donor & financial management systems)

Funding Sources

In-kind Resources

Budgets

Program

Program Descriptions, Goals & Objectives

Organizational Needs

Evaluation Capacity

Story Bank

Key Staff Bios & Job Descriptions

Key Partnerships

Grants & Contracts (current & pending)

Planning Your Project

Your Funding Needs

Key Questions

- Program?
  - Existing or New
- Cost?
  - Amount & Frequency
- Timing?
  - Approval(s) Needed & Start Date
- Other Non-Grant Resources?

Types of Support

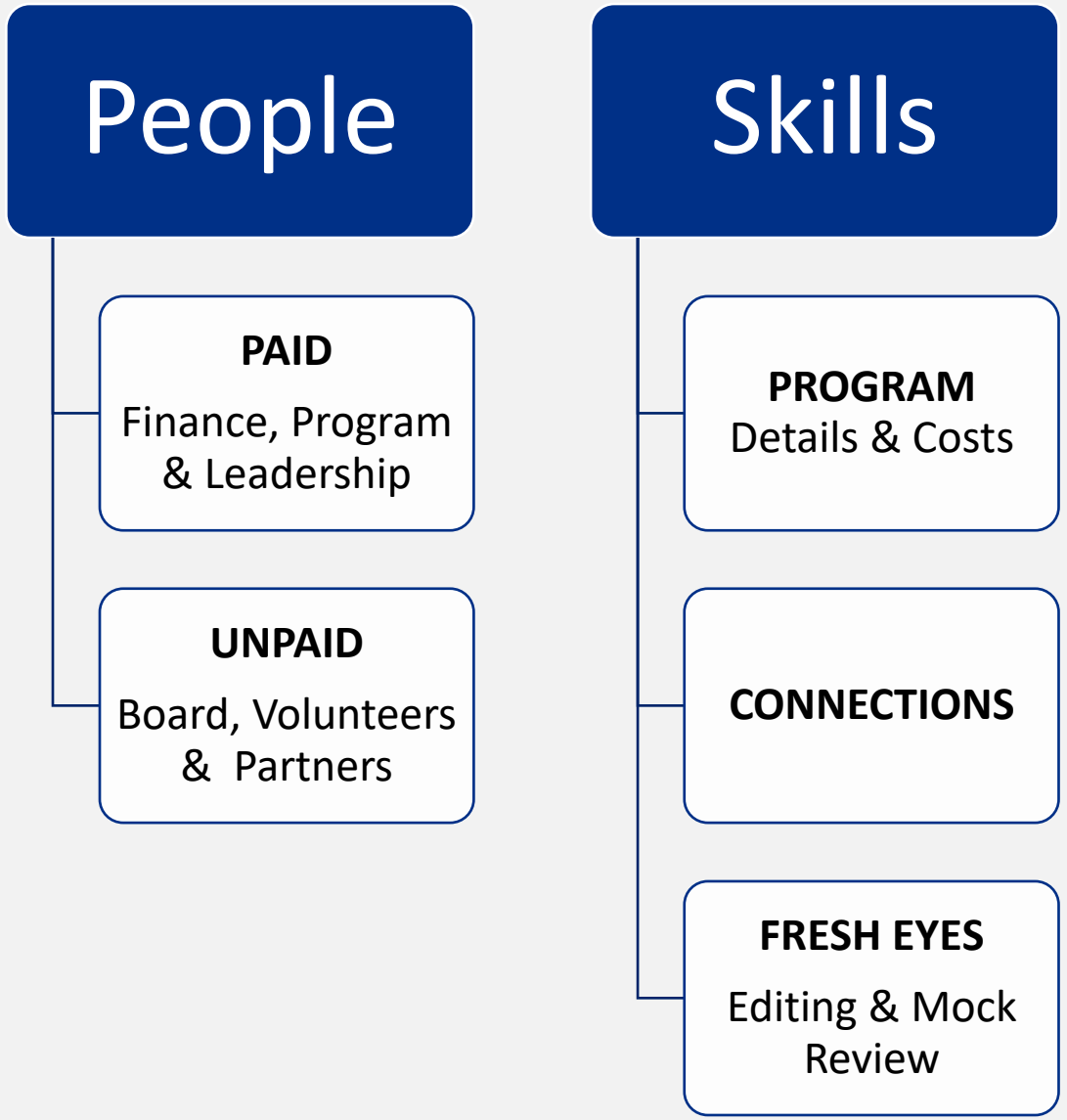
What's Your Priority?

Type	Description
General Operating	Unrestricted operating support
Program/Project	Restricted specific program/project support
Equipment	Purchase of equipment, computers, office furniture, etc.
Capacity	Development of skills and systems to build effectiveness and sustainability
Capital/Building	Capital campaigns and construction/renovation projects
Challenge	Funds dependent upon money raised from other sources
In-Kind	Products or services
Sponsorships	Special community/fundraising events, company vehicle "wraps"

Create a Grant Team

Find Your People

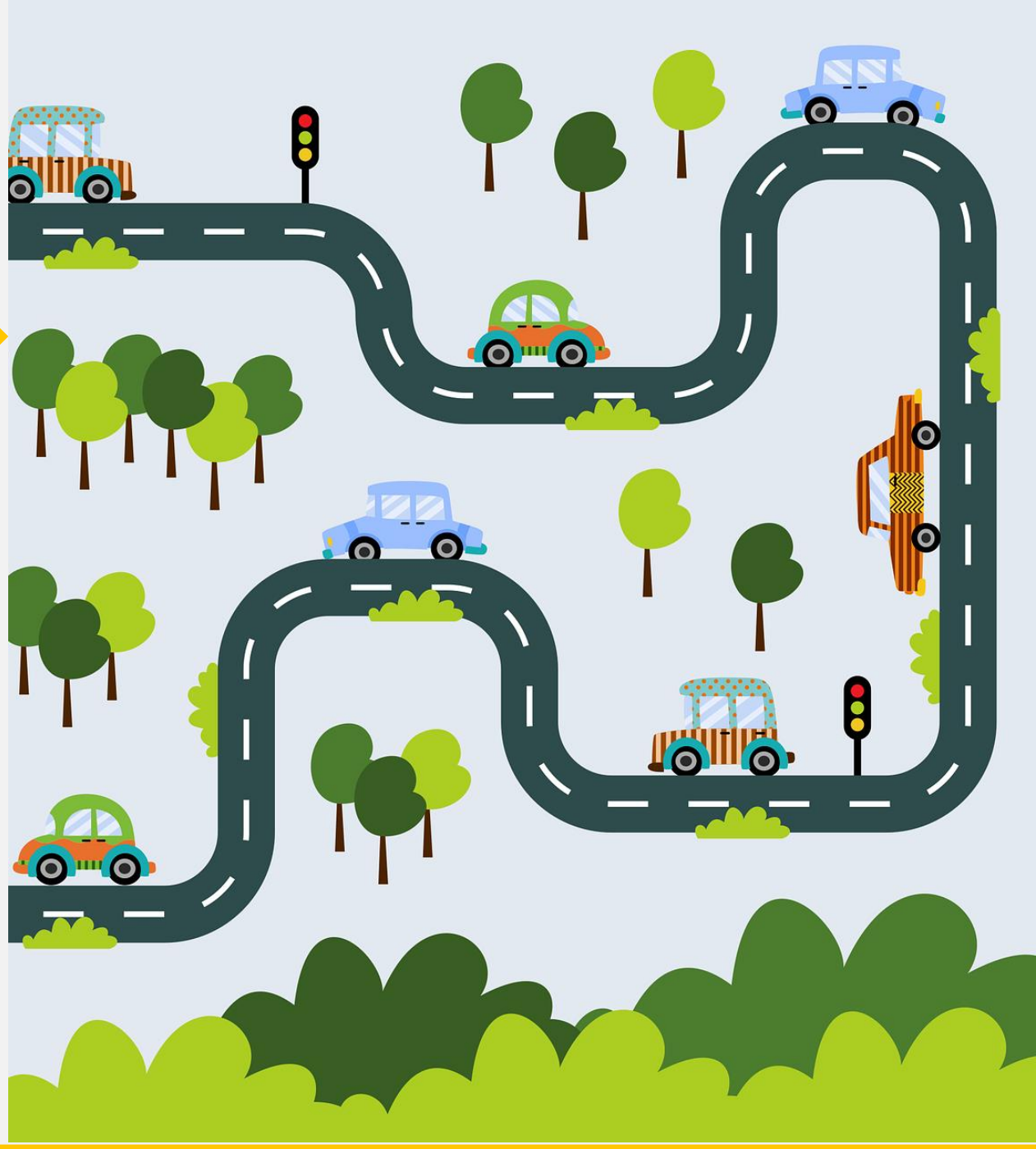
- Who develops and writes grants at your organization?



Program Roadmap

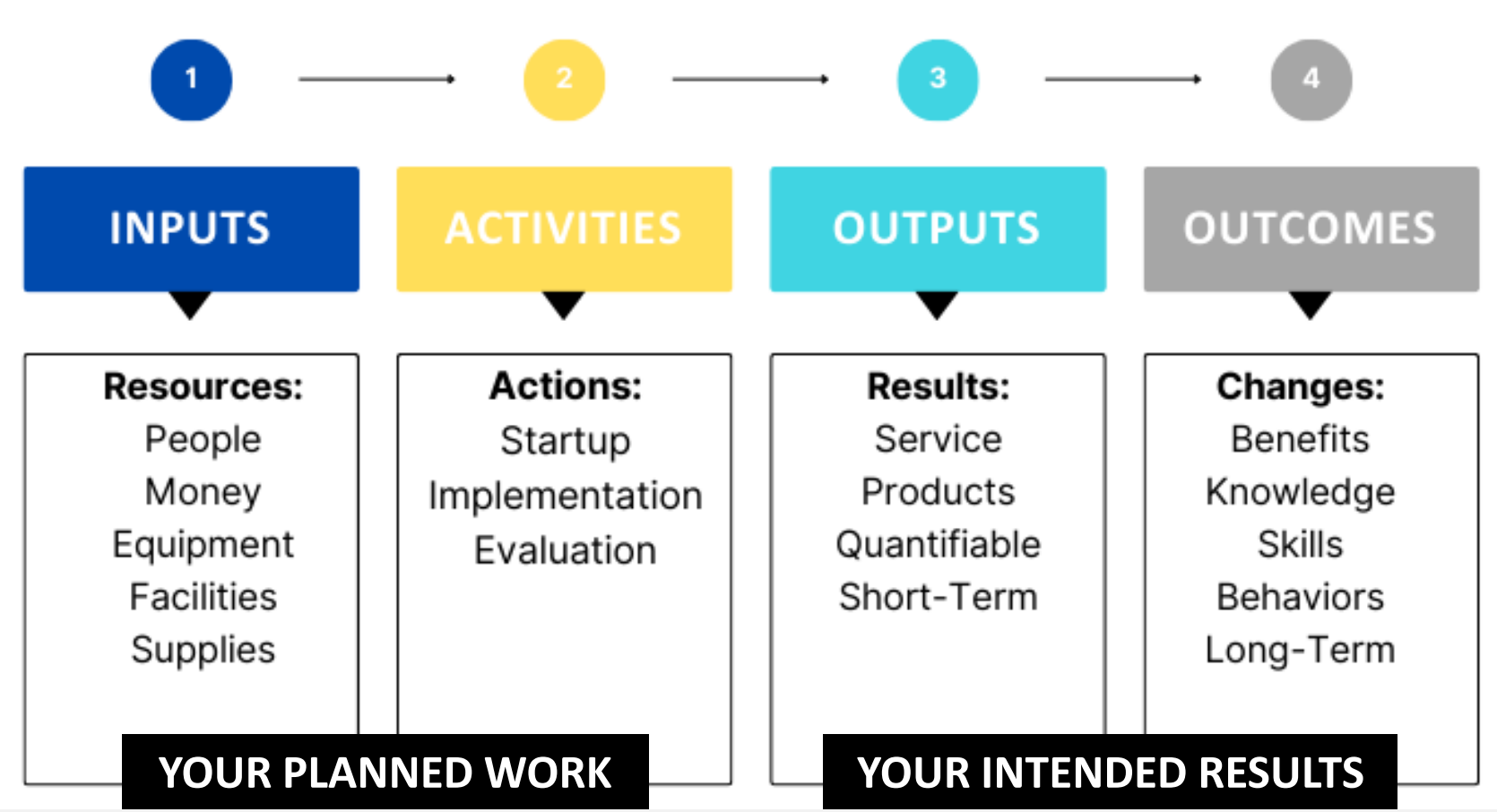
Logic Model

- Visual Snapshot
- Sequence of Events
- Simple or Complex
- Program Planning
  - Budget
  - Project Narrative
  - Goals and Objectives
  - Evaluation



Logic Model Components

Map it Out



Baseline Proposal

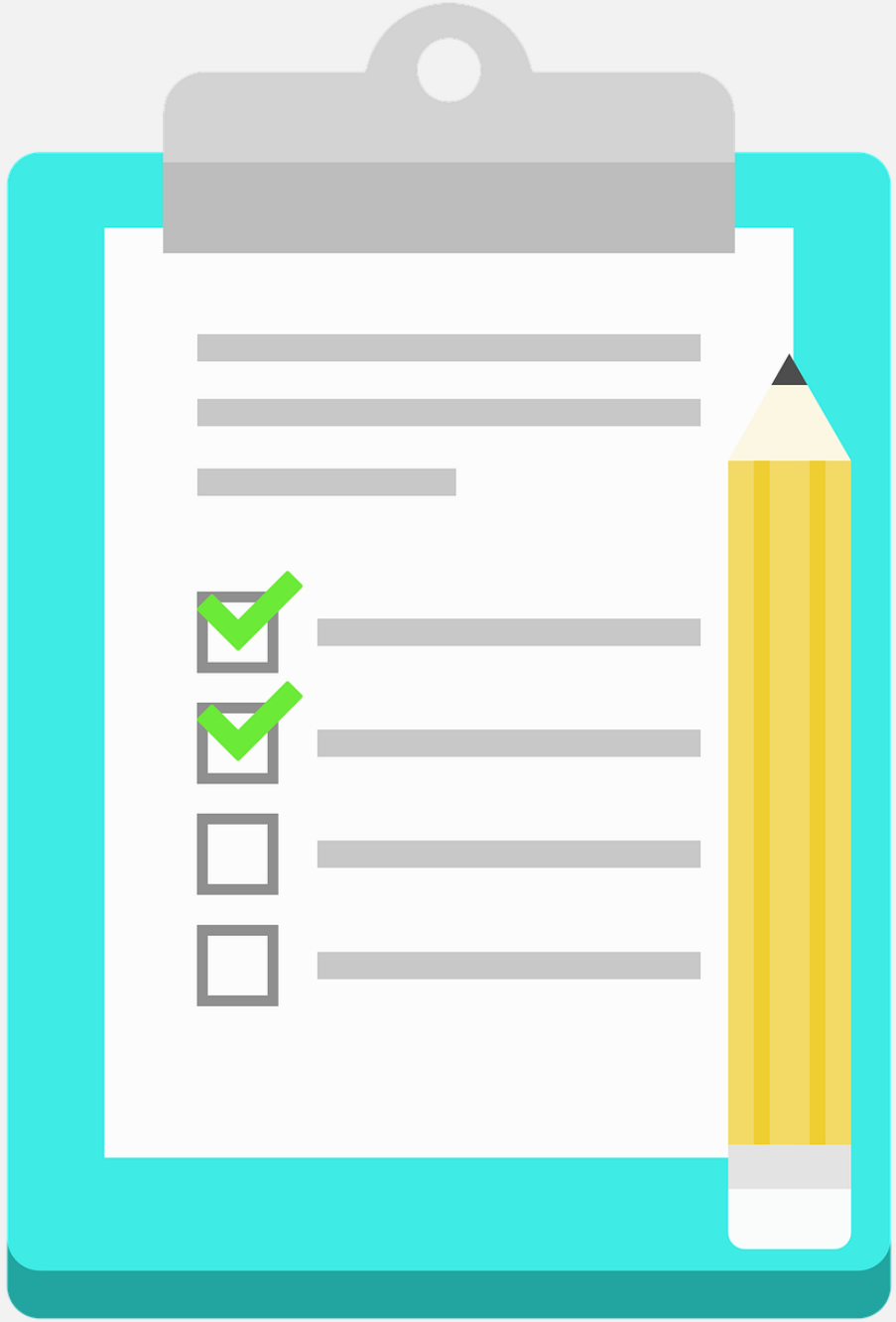
Typical Components

Term	Description
Summary	One-sentence overview of your program.
Mission	Organizational mission statement.
Community Need	Specific community need your program will address.
Target Population	Description of the beneficiaries of your program.
Define Success	Specific changes you want to achieve as a direct result of your work.
Major Steps	High-level timeline for program implementation.
Partners	Who will work with you to address the community problem.
Evaluation	Tools, data, information you can use to decide if you met your goals.
Total Cost	Estimated total cost.

Checkpoint

Progress: Grant Readiness

- Toolbox Documents
- Define Your Funding Need
- Grant Team
- Logic Model
- Baseline Proposal



Researching Good Fit Funders

Good Fit Funders

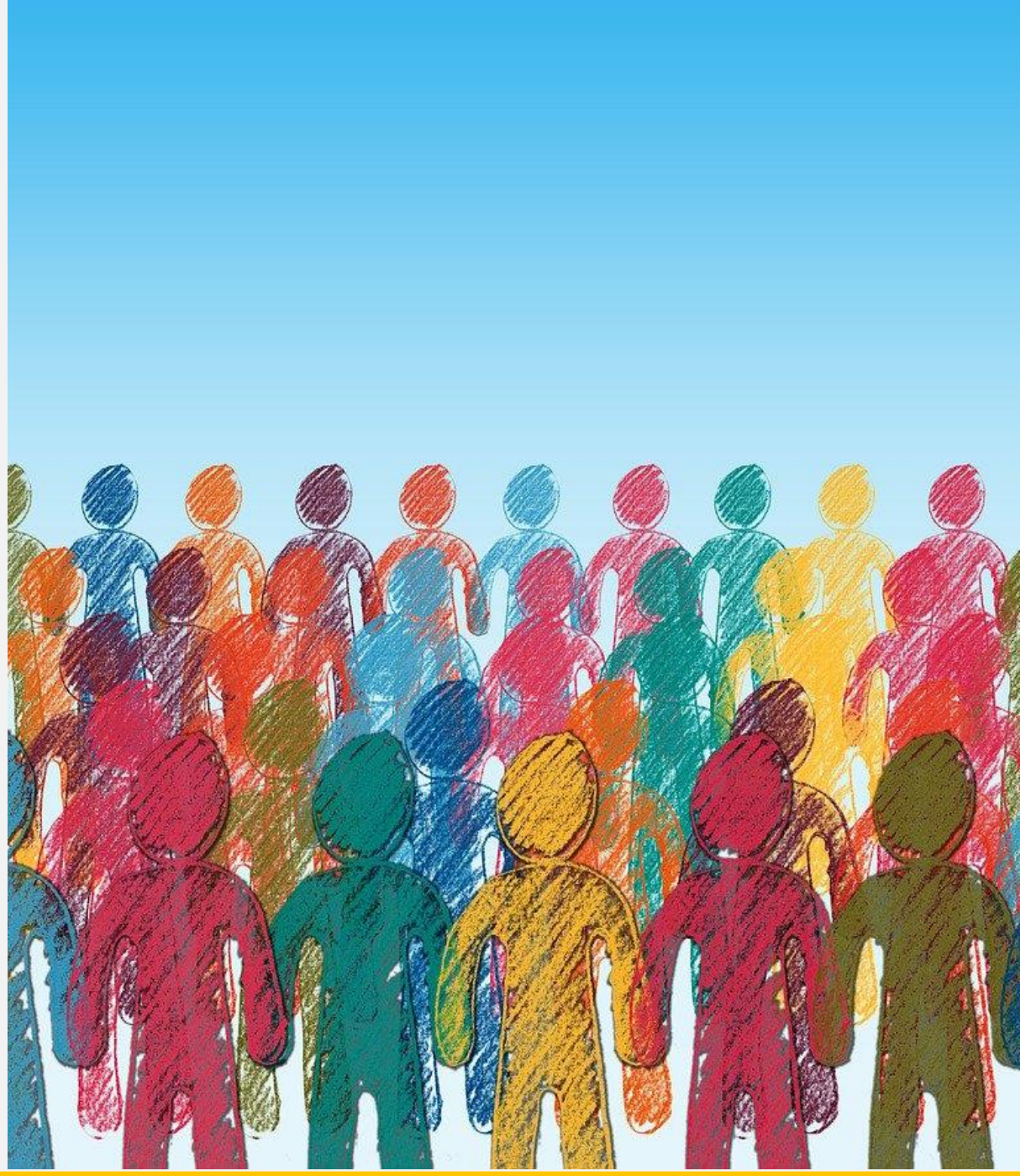
Be Competitive: Eligibility & Capacity

- Geographic
- Organization Type
- Mission & Project Alignment
- Deadline
- Award: Amount, Payout & Match
- Reporting Requirements
- Existing Internal Systems

Private Funding

Corporations & Foundations

- Corporations
  - Grants
  - In-Kind Resources
  - Sponsorships
- Community Foundations
  - Specific Geography
  - Build Local Capacity
- Private Foundations
  - Income from Families & Individuals
  - Funding Interests Vary by Donor Philosophy



Private Funding Resources

Name	URL
Candid Funding Information Network	candid.org/find-us UTRGV Nonprofit Resource Center - utrgv.edu/nrc/services/grant-directory/
Community Foundation Locator	cof.org/page/community-foundation-locator
DSHS Grant Development Center	dshs.texas.gov/grant-applications-funding/grant-development-center
Grantmakers.io	grantmakers.io
Guide Star (990s)	guidestar.org
ProPublica Nonprofit Explorer (990s)	projects.propublica.org/nonprofits/
Subscription Databases	Many vendor options. Grant Gopher's "Lite" Membership is free. (grantgopher.com)
Other Nonprofit Organizations	Websites, Annual Reports, Social Media, Events

Public Funding

Local, State & Federal Governments

- Growth and scale
- Long applications with extensive requirements
- Reimbursement model
- High levels of compliance in internal controls, monitoring, and reporting

Public Funding Resources

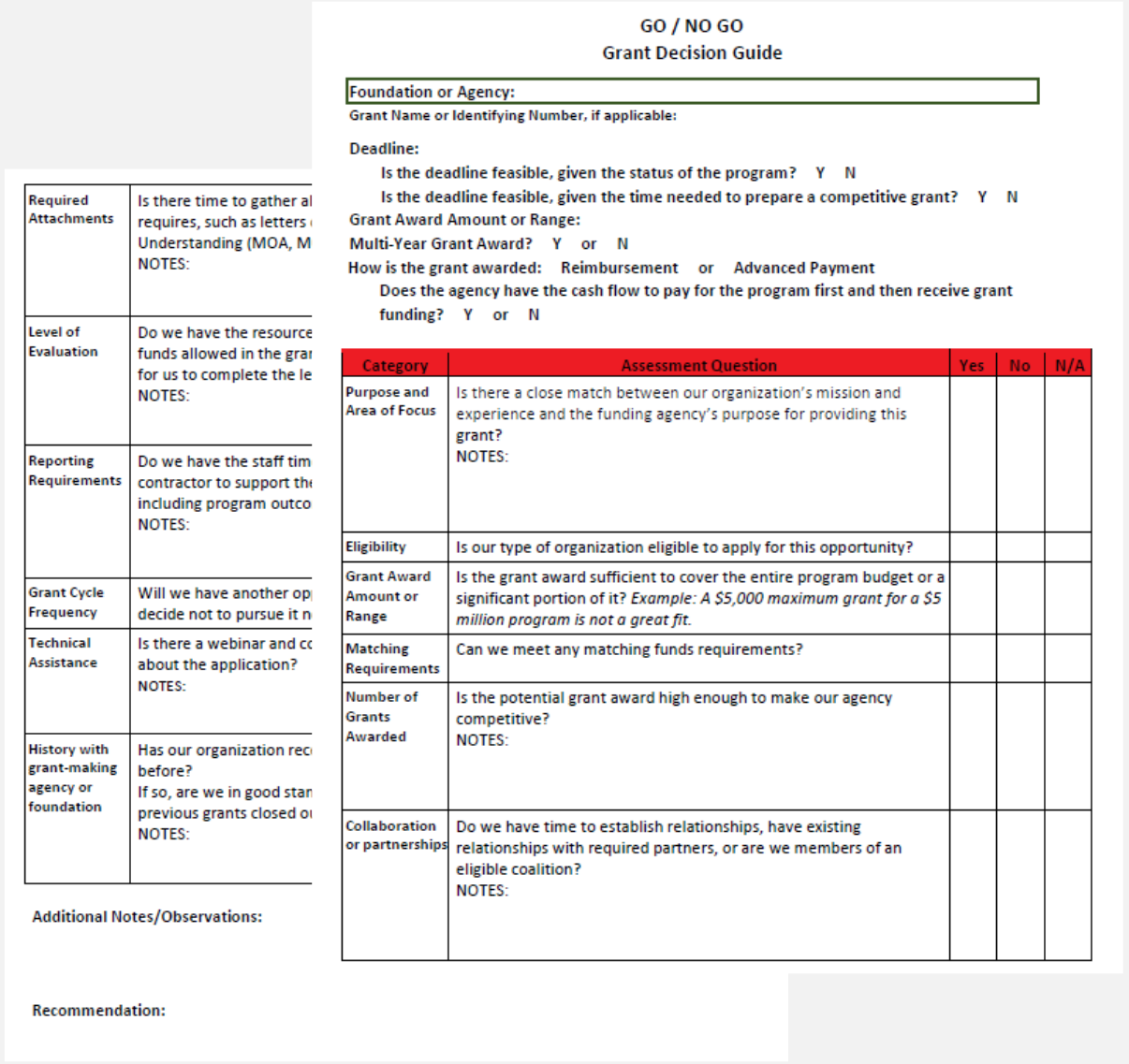
Name	URL
Grants.gov (Federal)	grants.gov
Texas Council for Developmental Disabilities	tcdd.texas.gov
Texas Department of Housing and Community Affairs	tdhca.texas.gov/notices-funding-availability-nofas
Texas HHS Grants	hhs.texas.gov/business/grants
Texas Rural Funders	texasruralfunders.org/grant/
Texas State Office of Rural Health	texasagriculture.gov/Grants-Services/Rural-Economic-Development/State-Office-of-Rural-Health
Texas Veterans Commission	tvc.texas.gov/grants
County & Municipal Governments	Look for Bid Opportunities, Purchasing, etc.

Decision Tracking

Avoid the “Grant Grab”

- Informed Decisions
- Historical Reference
- Save Time

“GO/NO GO Grant Decision Guide”
haydayservices.com



GO / NO GO
Grant Decision Guide

Foundation or Agency:

Grant Name or Identifying Number, if applicable:

Deadline:

Is the deadline feasible, given the status of the program? Y N

Is the deadline feasible, given the time needed to prepare a competitive grant? Y N

Grant Award Amount or Range:

Multi-Year Grant Award? Y or N

How is the grant awarded: Reimbursement or Advanced Payment

Does the agency have the cash flow to pay for the program first and then receive grant funding? Y or N

Category	Assessment Question	Yes	No	N/A
Purpose and Area of Focus	Is there a close match between our organization’s mission and experience and the funding agency’s purpose for providing this grant? NOTES:			
Eligibility	Is our type of organization eligible to apply for this opportunity?			
Grant Award Amount or Range	Is the grant award sufficient to cover the entire program budget or a significant portion of it? *Example: A $5,000 maximum grant for a $5 million program is not a great fit.*			
Matching Requirements	Can we meet any matching funds requirements?			
Number of Grants Awarded	Is the potential grant award high enough to make our agency competitive? NOTES:			
Collaboration or partnerships	Do we have time to establish relationships, have existing relationships with required partners, or are we members of an eligible coalition? NOTES:			

Required Attachments	Is there time to gather al requires, such as letters Understanding (MOA, M NOTES:
Level of Evaluation	Do we have the resource funds allowed in the gra for us to complete the le NOTES:
Reporting Requirements	Do we have the staff tim contractor to support th including program outco NOTES:
Grant Cycle Frequency	Will we have another op decide not to pursue it n
Technical Assistance	Is there a webinar and cc about the application? NOTES:
History with grant-making agency or foundation	Has our organization rec before? If so, are we in good stan previous grants closed o NOTES:

Additional Notes/Observations:

Recommendation:

Website Review

- Mission Statement
- Key Phrases/Words
- Application Guidelines
- Evaluation Criteria
- Giving History
- Form 990/990-PF
- Contact Information

South Texas

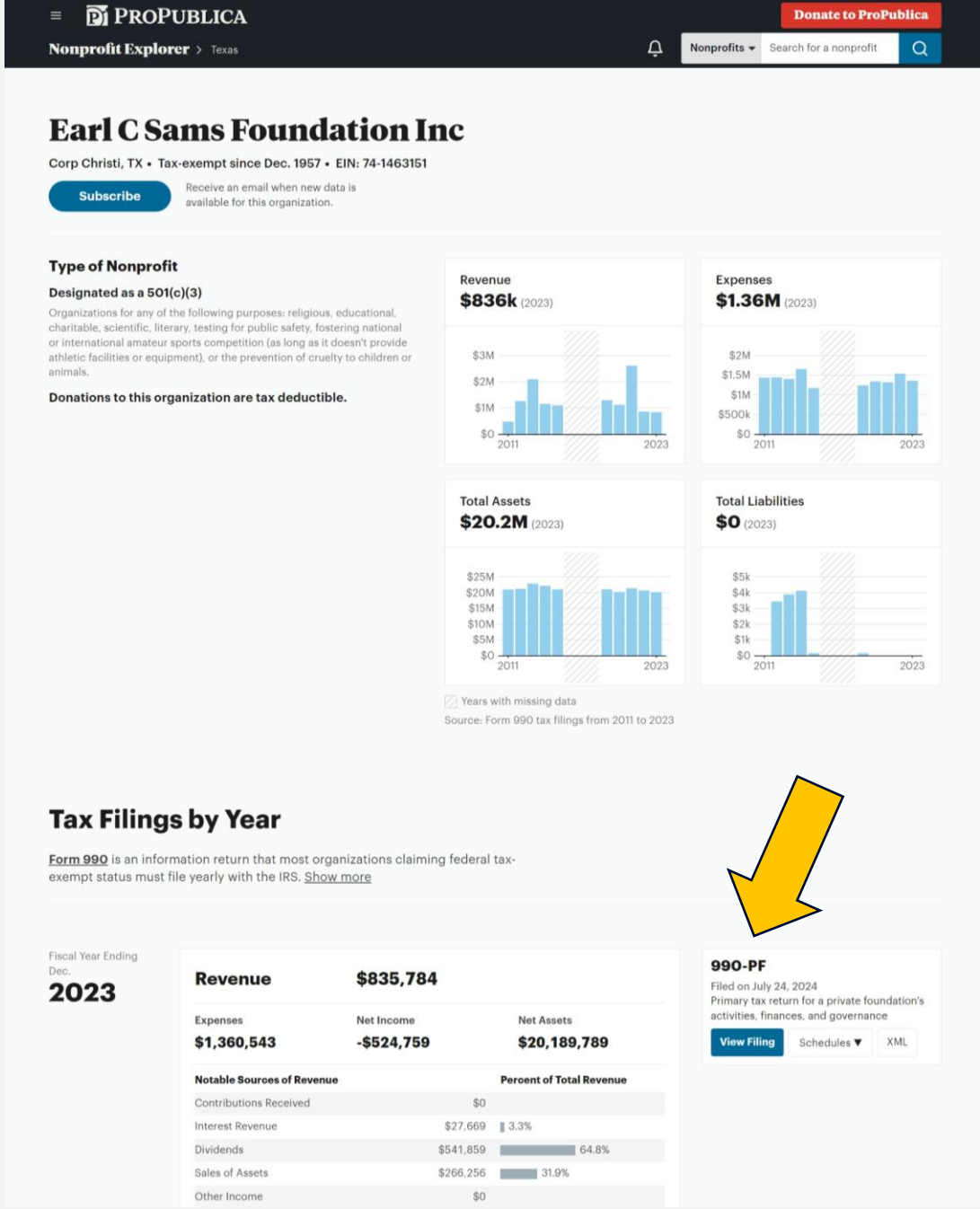
- Brownsville Community Foundation - Cameron County
- Coastal Bend Community Foundation - Aransas, Bee, Jim Wells, Kleberg, Nueces, Refugio, and San Patricio Counties
- Earl C Sams Foundation
- John G & Marie Stella Kenedy Memorial Foundation
- Knapp Community Care Foundation - Cameron, Hidalgo, and Willacy Counties
- Laredo Area Community Foundation - City of Laredo
- Raul Tijerina, Jr. Foundation - Cameron, Hidalgo, Starr, and Willacy Counties
- Rio Grande Electric Co-Op Sharing Success Grants - Brewster, Crockett, Culberson, Dimmit, Edwards, El Paso, Hudspeth, Jeff Davis, Kinney, Maverick, Pecos, Presidio, Reeves, Terrell, Uvalde, Val Verde, Webb and Zavala Counties
- Rio Grande Valley Community Foundation - Hidalgo County
- Robert J Kleberg Jr and Helen C Kleberg Foundation - Brooks, Jim Wells, Kenedy, Kleberg, and Nueces Counties
- Trull Foundation
- Valley Baptist Legacy Foundation - Cameron, Hildago, Starr, and Willacy Counties

dshs.texas.gov/grant-applications-funding/grant-development-center/funding-resources

Form 990/990-PF Review

- Mission
- Governance and Management
- Geographic Scope
- Financial Actions
- Part VII: Officers, Directors, Etc.
- Part XIV: Supplementary Information

projects.propublica.org/nonprofits/



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Form **990-PF**
Department of the Treasury
Internal Revenue Service

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

▶ **Do not enter social security numbers on this form as it may be made public.**
▶ **Go to *www.irs.gov/Form990PF* for instructions and the latest information.**

OMB No. 1545-0047

2023

Open to Public Inspection

For calendar year 2023, or tax year beginning 01-01-2023 , and ending 12-31-2023

Name of foundation
EARL C SAMS FOUNDATION INC
C/O BRUCE S HAWN

A Employer identification number
74-1463151

Number and street (or P.O. box number if mail is not delivered to street address)
101 N SHORELINE BLVD 500

Room/suite

B Telephone number (see instructions)
(361) 883-1871

City or town, state or province, country, and ZIP or foreign postal code
CORPUS CHRISTI, TX 78401

C If exemption application is pending, check here ▶ ☐

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here..... ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ... ▶ ☐

H Check type of organization: ☑ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

E If private foundation status was terminated under section 507(b)(1)(A), check here ..... ▶ ☐

I Fair market value of all assets at end of year (from Part II, col. (c), *line 16)* ▶$ 25,177,313

J Accounting method: ☑ Cash ☐ Accrual ☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ..... ▶ ☐

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BRUCE S HAWN 413 UPPER CIBOLO CREEK ROAD BOERNE, TX 78006	PRESIDENT, CEO & DIRECTOR 15.00	82,065	12,310	0
SUSAN G HAWN 215 TAMERLAINE HOUSTON, TX 77024	V. P., CHAIRMAN & DIRECTOR 15.00	69,414	10,412	0
NANCY HAWN 413 UPPER CIBOLO CREEK ROAD BOERNE, TX 78006	DIRECTOR 1.00	3,900	0	0
SUSAN OHNMACHT 260 DOVER LANE MADISON, MS 39110	ASST TREASURER/SECRETARY 36.00	105,161	15,774	0
CANDACE N COUTINHO 16302 SACRE COUER SAN ANTONIO, TX 78232	DIRECTOR 1.00	3,900	0	0

Part XIV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:
BRUCE S HAWN
101 N SHORELINE BLVD SUITE 602
CORPUS CHRISTI, TX 78401

b The form in which applications should be submitted and information and materials they should include:
APPLICATION AND GUIDELINES ARE AVAILABLE ON THE FOUNDATION'S WEB SITE OR BY MAILING REQUESTS TO FOUNDATION OFFICE.

c Any submission deadlines:
30 DAYS PRIOR TO BOD MEETINGS, WHICH GENERALLY ARE THE LAST WEEK OF MARCH, JUNE AND NOVEMBER.

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:
DISTRIBUTIONS ARE MADE ONLY TO TAX EXEMPT ORGANIZATIONS, PRIMARILY IN THE SOUTH TEXAS AREA.

Part XIV Supplementary Information (continued)

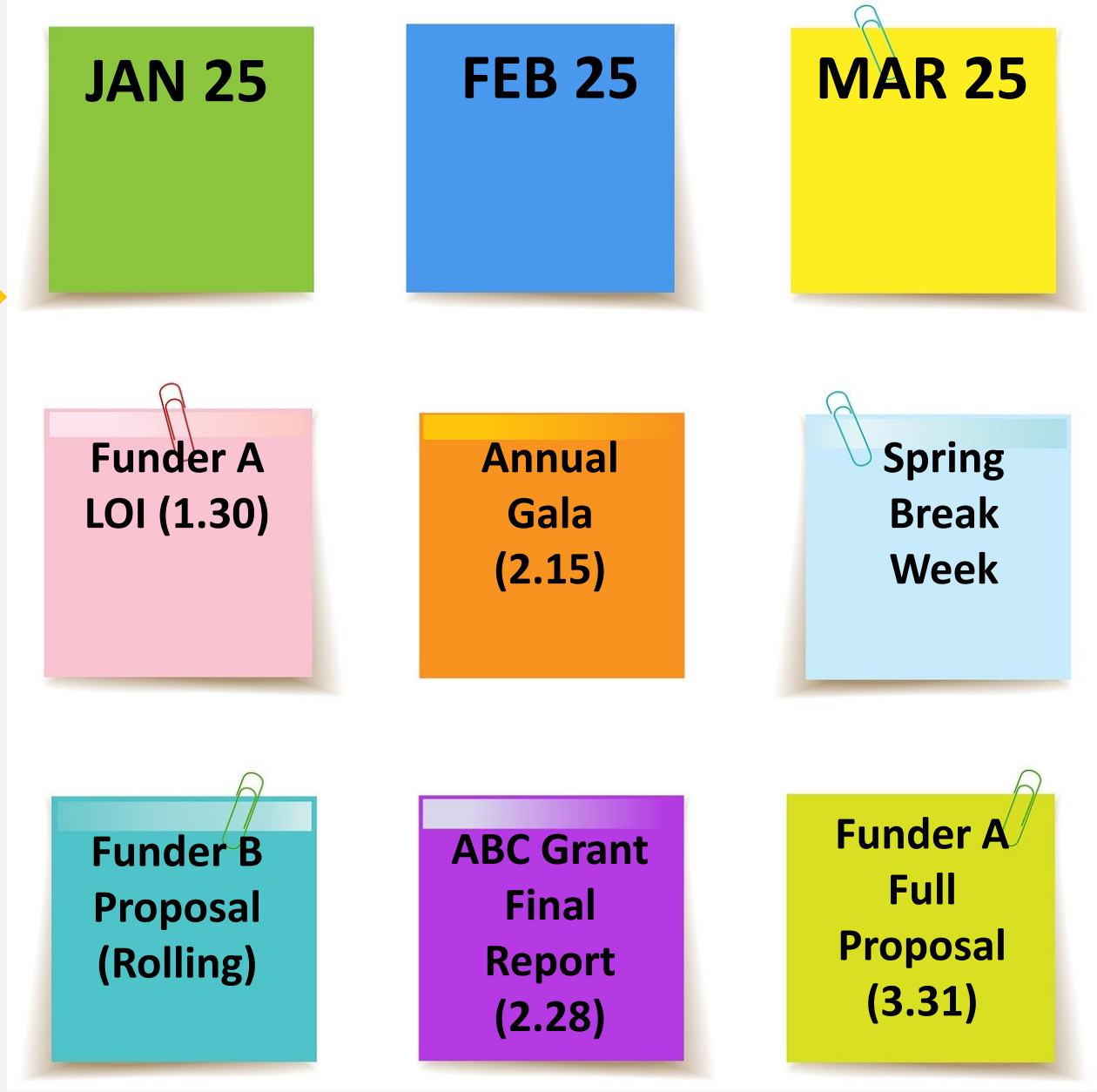
3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
1 HOPE FOR KIDS 1150 W IH 10 STE 255 SAN ANTONIO, TX 78230	NONE	PUBLIC	GENERAL OPERATING SUPPORT	10,000
AGAPE HARBOR 5151 FLYNN PARKWAY SUITE 106 CORPUS CHRISTI, TX 78411	NONE	PUBLIC	GENERAL OPERATING SUPPORT	10,000
BAND PARENTS WINSTON CHURCHILL HIGH SCHOOL 12049 BLANCO ROAD SAN ANTONIO, TX 78247	NONE	PUBLIC	GENERAL OPERATING SUPPORT	10,000
AGAPE RANCH 5151 FLYNN PARKWAY SUITE 105 CORPUS CHRISTI, TX 78411	NONE	PUBLIC	GENERAL OPERATING SUPPORT	10,000
ART CENTER OF CORPUS CHRISTI 100 N SHORELINE BLVD CORPUS CHRISTI, TX 78401	NONE	PUBLIC	GENERAL OPERATING SUPPORT	5,000

Grant Calendar

Planning Ahead

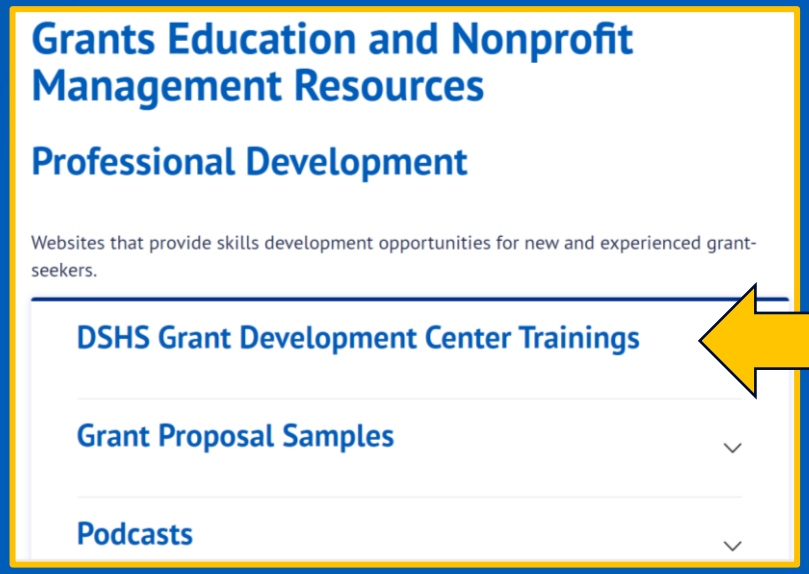
- Visible, Monthly Calendar
- Deadlines (Apps & Reports)
- Priorities
- Review Calendar as a Team
- Other Events & Vacations



Final Thoughts

- Grant development is 80% planning.
- Grant readiness doesn’t happen overnight.
- Research grants year-round: document your decisions and keep a grant calendar.
- Keep trying!

Q&A



The slides will be posted here by next Monday!

dshs.texas.gov/grant-applications-funding/grant-development-center/grantsmanship-and-nonprofit-management-resources

Thank you!

Get Ready for Grant Success

grantcenter@dshs.texas.gov

dshs.texas.gov/grant-applications-funding/grant-development-center