



2024 AWBC Conference

Grant Ready, Grant Steady: From Proposal to Compliance

Ascend Nonprofit & Business Solutions

Dr. Arlene Siller, Founder & CEO

Daniela Paz, COO



Who are we?



Arlene Siller, PhD
Founder & CEO



Daniela Paz
Chief Operations Officer



Organizational Readiness

Pre-Award: Fundraising

- Benefits of Organizational Readiness
- Structure
- Mission and Vision Statements
- One Page Strategic Plan
- Ecosystem Assessment
- Key Performance Indicators
- Documentation
- Governance
- Board of Directors
- Systems and Processes
- Program
- Revenue Diversification

One-Page Strategic Plan Template

www.strategypunk.com



Mission Statement

Write your Mission Statement here

Vision Statement

Write your Vision Statement here

Strategic Goal #1

Put your text here

Strategic Goal #2

Put your text here

Strategic Goal #3

Put your text here

Key Initiative #1

Put your text here

Key Initiative #2

Put your text here

Key Initiative #3

Put your text here

Ecosystem Assessment: Where is your organization in your community's ecosystem?



Documentation

- Strategic Plan
- Program budget
- Partnerships
- Letters of support/MOUs
- Marketing & communications
- Logic Model/Theory of Change
- Advisory board information & diversity profile

Strategic Board Composition Matrix

WORKSHEET A

Board Member Name: _____ Number of Years on the Board: _____ Current Term Expires: _____

Age	
Under 18	
19-34	
35-50	
51-65	
Over 65	
Gender	
Man	
Woman	
Non-binary	
Prefer not to answer	
Transgender	
No	
Yes	
Prefer not to answer	
Sexual Orientation	
Straight	
Gay	
Lesbian	
Bisexual	
Queer	
Prefer not to answer	
Race/Ethnicity (select as many as apply)	
African American/Black	
Asian/Pacific Islander	
Caucasian/White	
Hispanic/Latino	
Native American/Indian	
Other (please list):	
Community Connections	
Corporate	
Education	
Faith-based organizations	
Health care	
Media	
Philanthropy	
Political	
Small business	
Social services	
Other:	

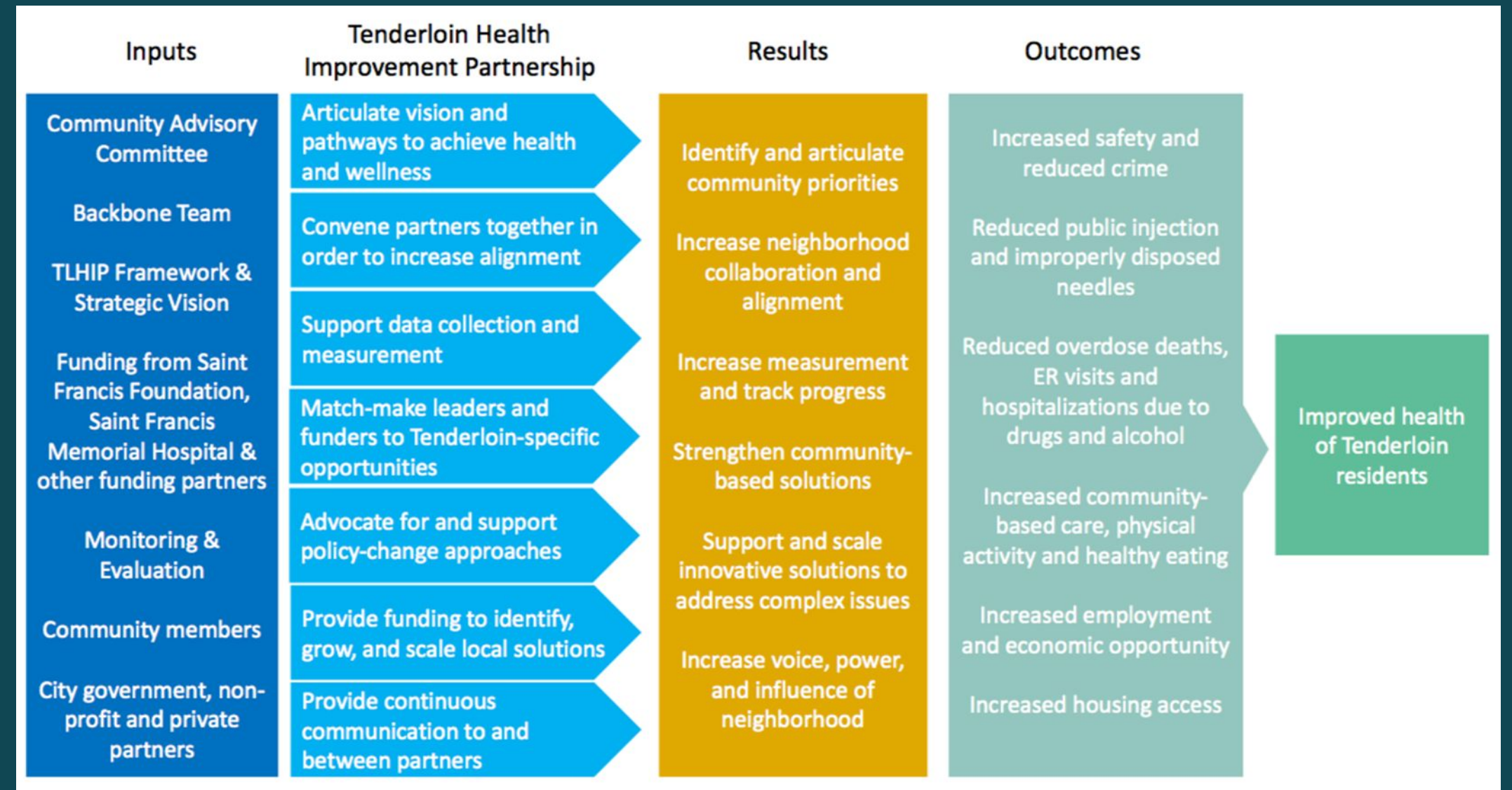
Financial Resources	
Money to give	
Access to other potential individual donors	
Access to other resources (e.g., foundations, corporate support)	
Qualities	
Leadership skills/motivator	
Willingness to work/availability	
Personal connection with the mission	
Personal Style (check the two that best apply)	
Catalyst for change	
Consensus builder	
Good communicator	
Mediator	
Implementer/gets things done	
Strategist/asks great questions	
Visionary	
Areas of Expertise (check the four that best apply)	
Administration/management	
Advocacy/public policy	
Education	
Entrepreneurship	
Financial management: accounting	
Financial management: investments	
Fundraising	
Government	
Governance/nonprofit management	
Health care/medicine	
Human resources	
Law	
Marketing/public relations	
Physical plant/facilities/engineering	
Real estate	
Social media	
Strategic planning	
Technology	
Other:	

EXCERPTED FROM THE BOARD-BUILDING CYCLE, THIRD EDITION, BY SUSAN S. MEIER.

Advisory Board

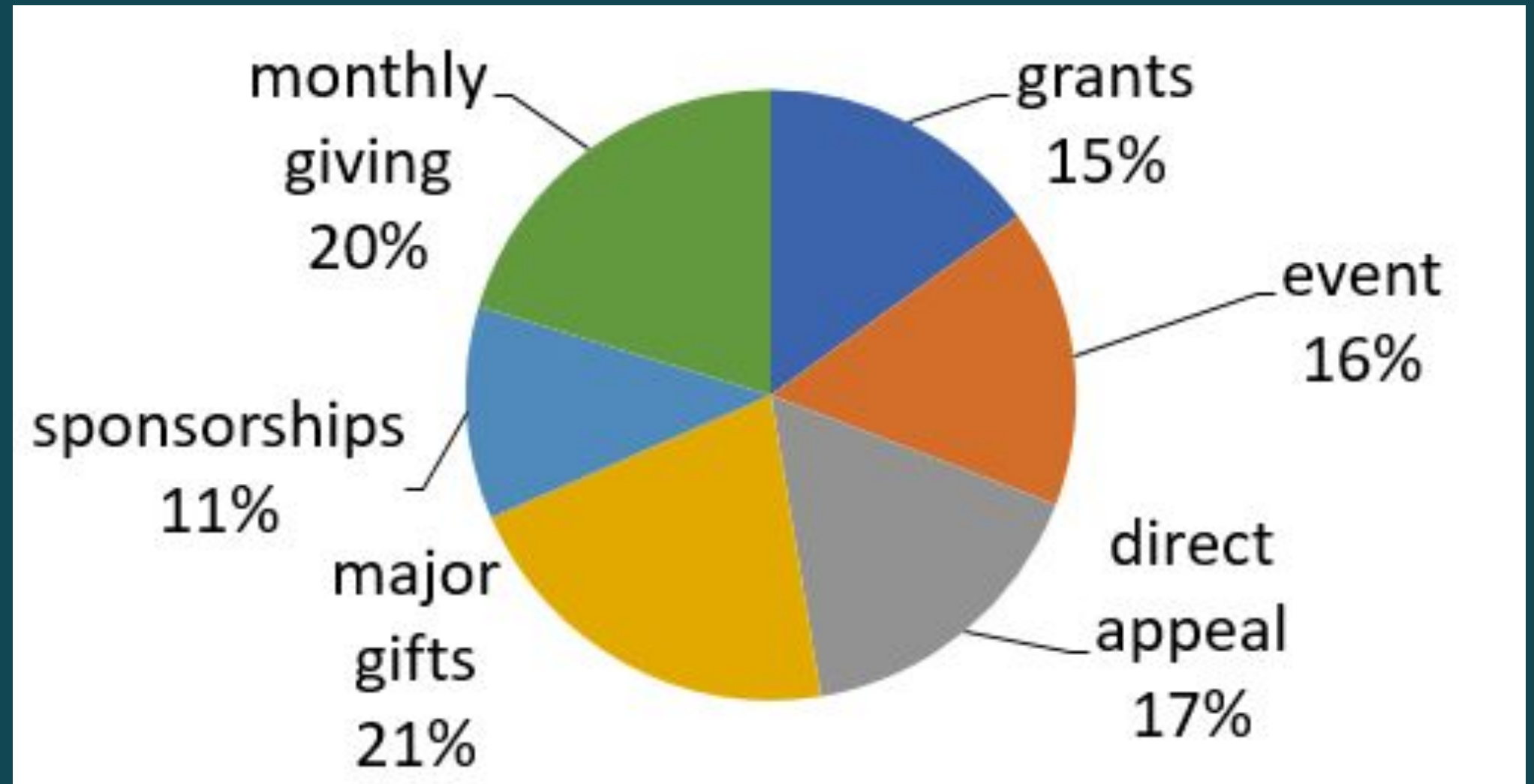
Program

- Align with mission
 - Avoid mission creep
- Based on community needs assessment
- Clearly defined goals, objectives & outcomes
- Funding for the program



Revenue Diversification

- It's recommended that no more than 20-25% of your income come from any one source besides individuals
- Grant research strategy
- Develop a grant pipeline



We got the grant!

Now What?

Organizational Readiness: Post-Award Management

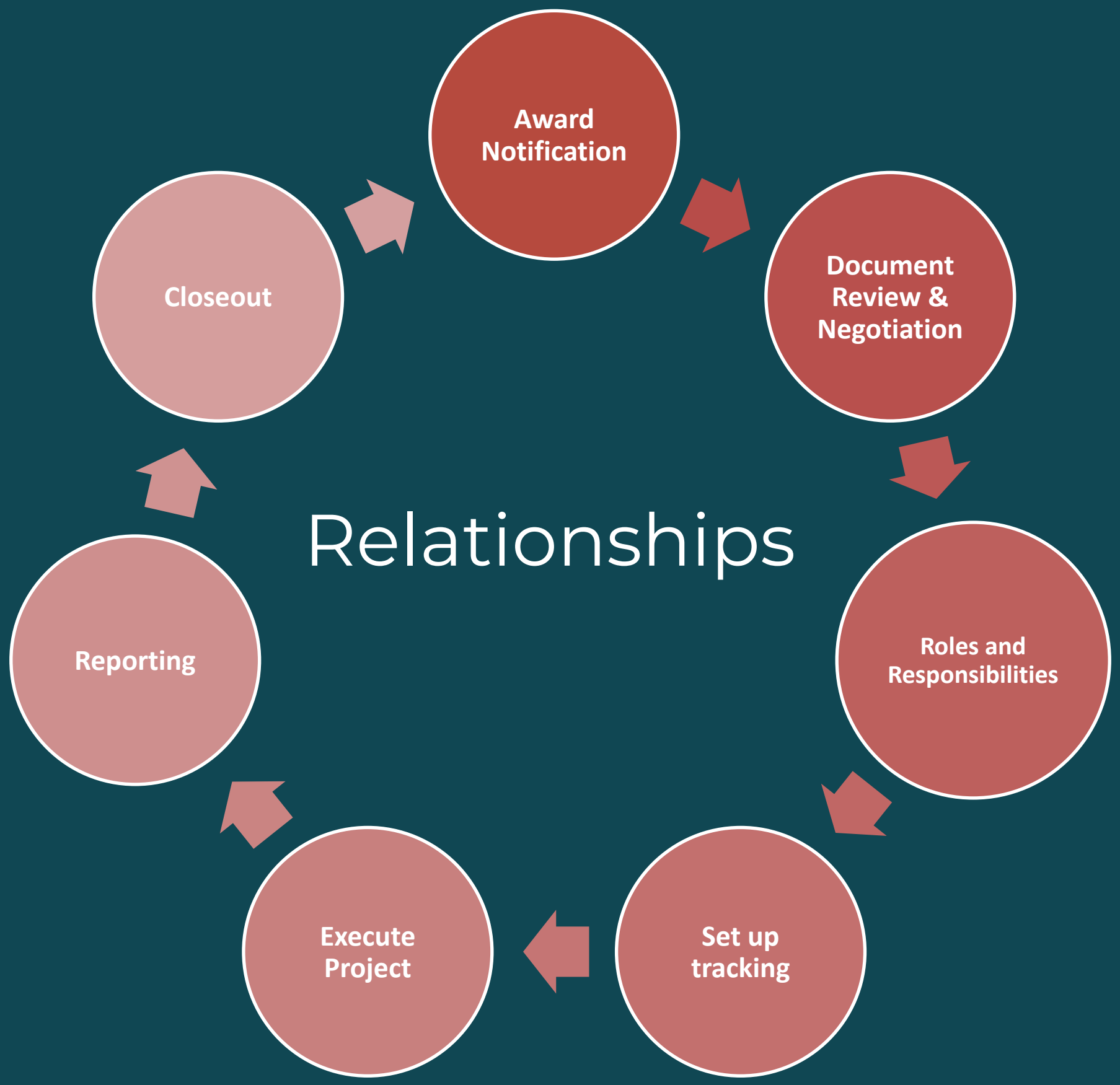


Organizational Readiness

Post-Award: Grant Management

- Grant Management Workflow
- Common Funder Requirements
- Processes and Procedures
- Grant Management Best Practices
- Impact

Grant Management Workflow



Common Funder Requirements



Financial

- Tracking grant expenditures
- Restricted vs unrestricted
- Allowable use of funds
- Access to accounting records



Oversight

- Audit or monitoring reviews
- Record retention
- Certifications
- 501c3 designation



Reporting

- Impact reports
- Financial reports
- Progress reports
- Third party evaluations



Media/Communications

- Press releases
- Donor recognition
- Logo use
- Client success stories

Processes and Procedures



Best Practices

Even if you have all the policies and procedures written up, you need to have practices that ensure compliance and consistency in execution



Review before signing

- Internal stakeholders review the agreement
- Create a relationship with your grant manager
- Can you negotiate?



Coordinate with Finance Team

- Notify of award for proper coding
 - Restrictions
 - Tracking/reporting
- Review invoice procedures
- Allocable, reasonable, allowable



Project Management Tools

- Collaboration apps:
 - Microsoft Office
 - Slack
 - Monday.com
- CRM or other data tracking tools
- Data analysis or visualization tools



Roles and Responsibilities

- Define roles and responsibilities
- Set up recurring monthly meetings
- Scorecard
- Training

Roles and Responsibilities

- **Responsible:** The person who does the work or completes the deliverable
- **Accountable:** The person who reviews the work of the person responsible and makes sure it is completed on time
- **Consulted:** The person or group who provides input or feedback on the work being done in a project.
- **Informed:** The person or group who need to be looped into the progress of a project but not consulted or overwhelmed with the details of every task. They need to know because it could affect their work but they are not decision makers in the



REPORT A TOUCHDOWN!

- **Systems**
- **Processes**
- **Clear roles**
- **Calendar**

Why is this important?

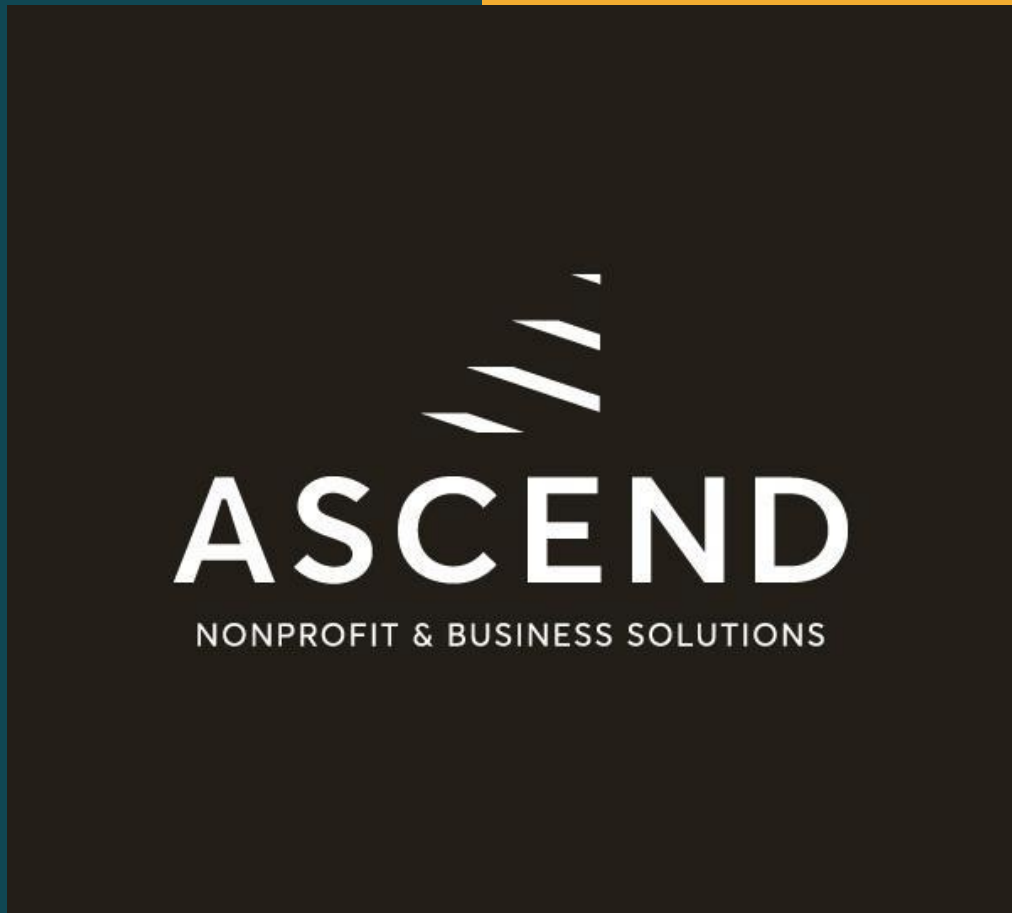
- Contractual agreement
- Contingent for future funding
- Internal tracking of success: are we living our mission?
- Nurtures relationship with funder and ensures continued alignment

CONTACT US

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Grant Compliance

OPTIMIZE SUCCESS