

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

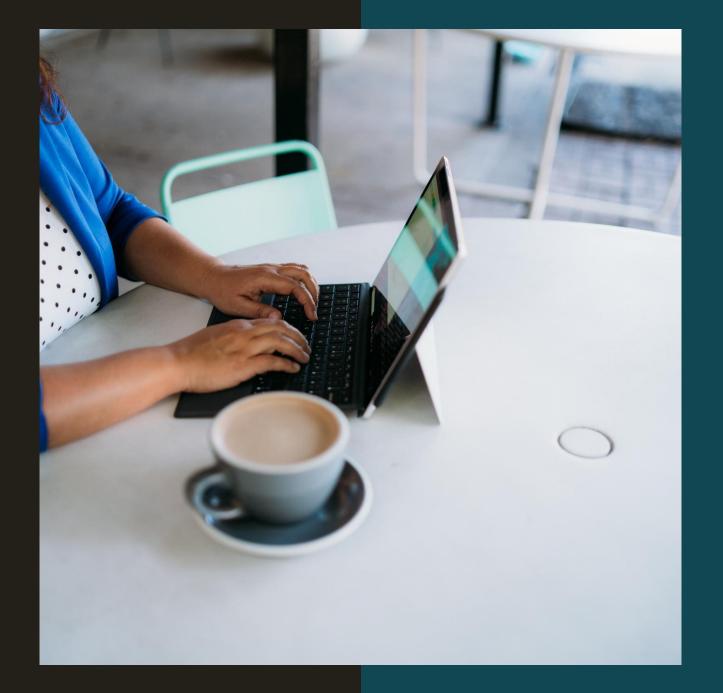


Daniela Paz Chief Operations Officer Ascend Nonprofit and Business Solutions LLCTM

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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



Write your Mission Statement here

Vision Statement

Write your Vision Statement here



Put your text here

Key Initiative #1

Put your text here

Put your text here

Strategic Goal #2

Key Initiative #2

Put your text here



www.strategypunk.com

Strategic Goal #3

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

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 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	Fina
Under 18	Mor
19-34	Acc
35-50	Acc
51-65	(e.g
Over 65	Qual
Gender	Lea
Man	Will
Woman	Per
Non-binary	Pers
Prefer not to answer	Cat
Transgender	Con
No	Goo
Yes	Med
Prefer not to answer	Imp
Sexual Orientation	Stra
Straight	Visi
Gay	Area
Lesbian	Adn
Bisexual	Adv
Queer	Edu
Prefer not to answer	Entr
Race/Ethnicity (select as many as apply)) Fina
African American/Black	Fina
Asian/Pacific Islander	Fun
Caucasian/White	Gov
Hispanic/Latino	Gov
Native American/Indian	Hea
Other (please list):	Hur
Community Connections	Law
Corporate	Mar
Education	Phy
Faith-based organizations	Rea
Health care	Soc
Media	Stra
Philanthropy	Tech
Political	Oth
Small business	
Social services	
Other:	EXCEP

inancial 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 a	pply)
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-BUILOWG CYCLE, THIND EDITION, BY SUSAN 5. MEER.

Advisory Board





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

Inputs	Tenderloin Health Improvement Partnership
Community Advisory Committee	Articulate vision and pathways to achieve health and wellness
Backbone Team TLHIP Framework &	Convene partners together in order to increase alignment
Strategic Vision Funding from Saint	Support data collection and measurement
Francis Foundation, Saint Francis Memorial Hospital & other funding partners	Match-make leaders and funders to Tenderloin-specifi opportunities
Monitoring & Evaluation	Advocate for and support policy-change approaches
Community members	Provide funding to identify, grow, and scale local solution
City government, non- profit and private partners	Provide continuous communication to and between partners

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Results

Identify and articulate community priorities

Increase neighborhood collaboration and alignment

Increase measurement and track progress

Strengthen communitybased solutions

Support and scale innovative solutions to address complex issues

Increase voice, power, and influence of neighborhood

Outcomes

Increased safety and reduced crime

Reduced public injection and improperly disposed needles

Reduced overdose deaths ER visits and hospitalizations due to drugs and alcohol

Increased communitybased care, physical activity and healthy eating

Increased employment and economic opportunity

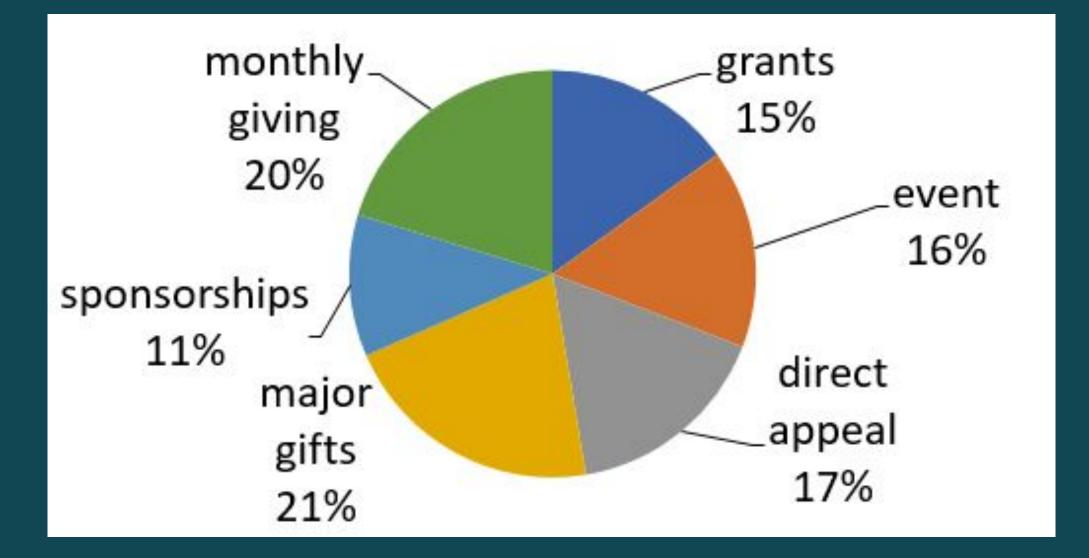
Increased housing access

Improved health of Tenderloin residents



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

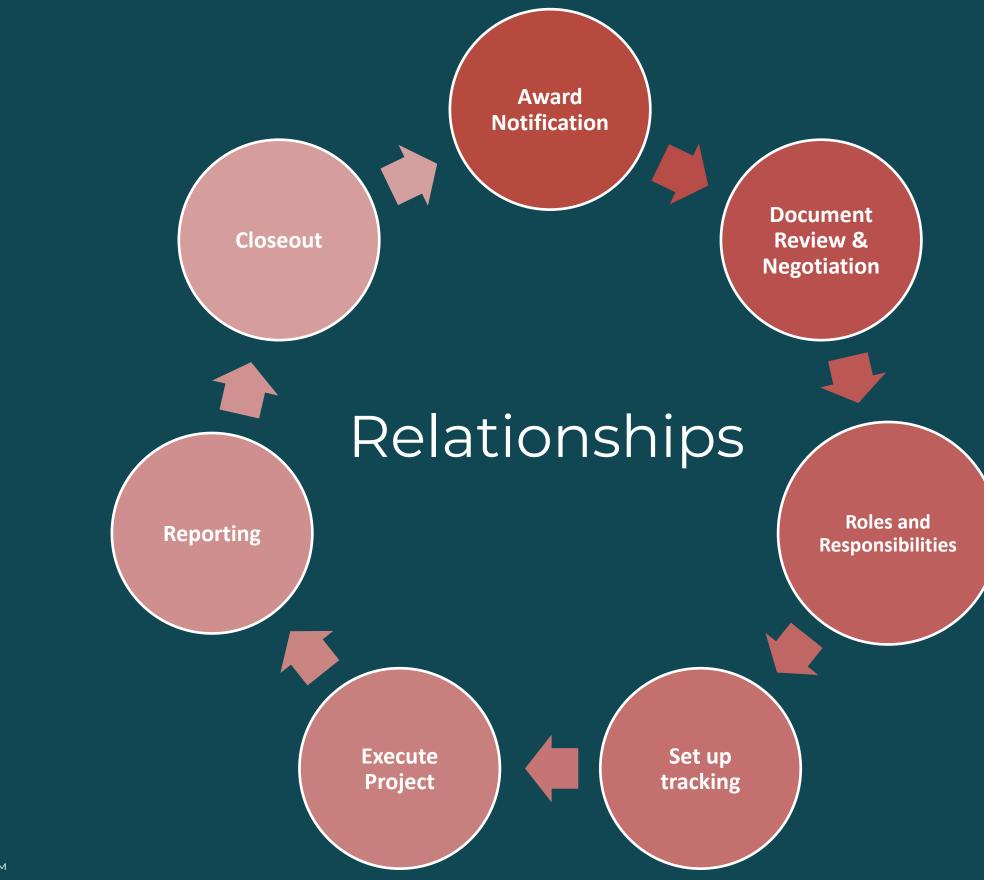
- Impact

Post-Award: Grant Management

• Grant Management Workflow • Common Funder Requirements • Processes and Procedures • Grant Management Best Practices



Grant Management Workflow





Common Funder Requirements

• • •	

Financial

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



Reporting

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





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Oversight

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

Media/Communications

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



Processes and Procedures

Operations Financial Monitoring

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• Human resources

- Property management
- Record retention
- Procurement
- Advisory board

- Grant tracking and allocation
- Cost allowability
- Matching Funds
- Approval and Processing
- Reporting

- Data collection and integrity
- •Reporting SOPs
- Budget vs Actuals
- Risk Assessment
- •Ongoing internal monitoring



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





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

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



- - Slack
 - Monday.com
- CRM or other data tracking tools
- Data analysis or visualization tools





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

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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



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Grant Compliance

OPTIMIZE SUCCESS