Impact Austin Nonprofit Workshop 2025 Grants

2025 | Impact Austin

Meeting Agenda

12:05 – 12:15   Welcome
                  Karen McLinden, Impact Austin Grants Co-Chair

12:15 – 12:20   Amplify Credit Union Sponsorship

12:20 – 1:05   Impact Austin Grant Process Overview
                  Elaine Jensen, Impact Austin Nonprofit Coordinator
                  Fay Evans-Martin, Impact Austin Nonprofit Coordinator
                  Margaret Ballinger, Impact Austin Grants Finance Coordinator

1:05 – 1:15   Grant Process Experience
                  Lisa Barden, Executive Director, Keep Austin Fed

1:15 – 1:30   Q&A
                  Karen McLinden, Impact Austin Grants Co-Chair
                  Margaret Ballinger, Impact Austin Grants Finance Coordinator
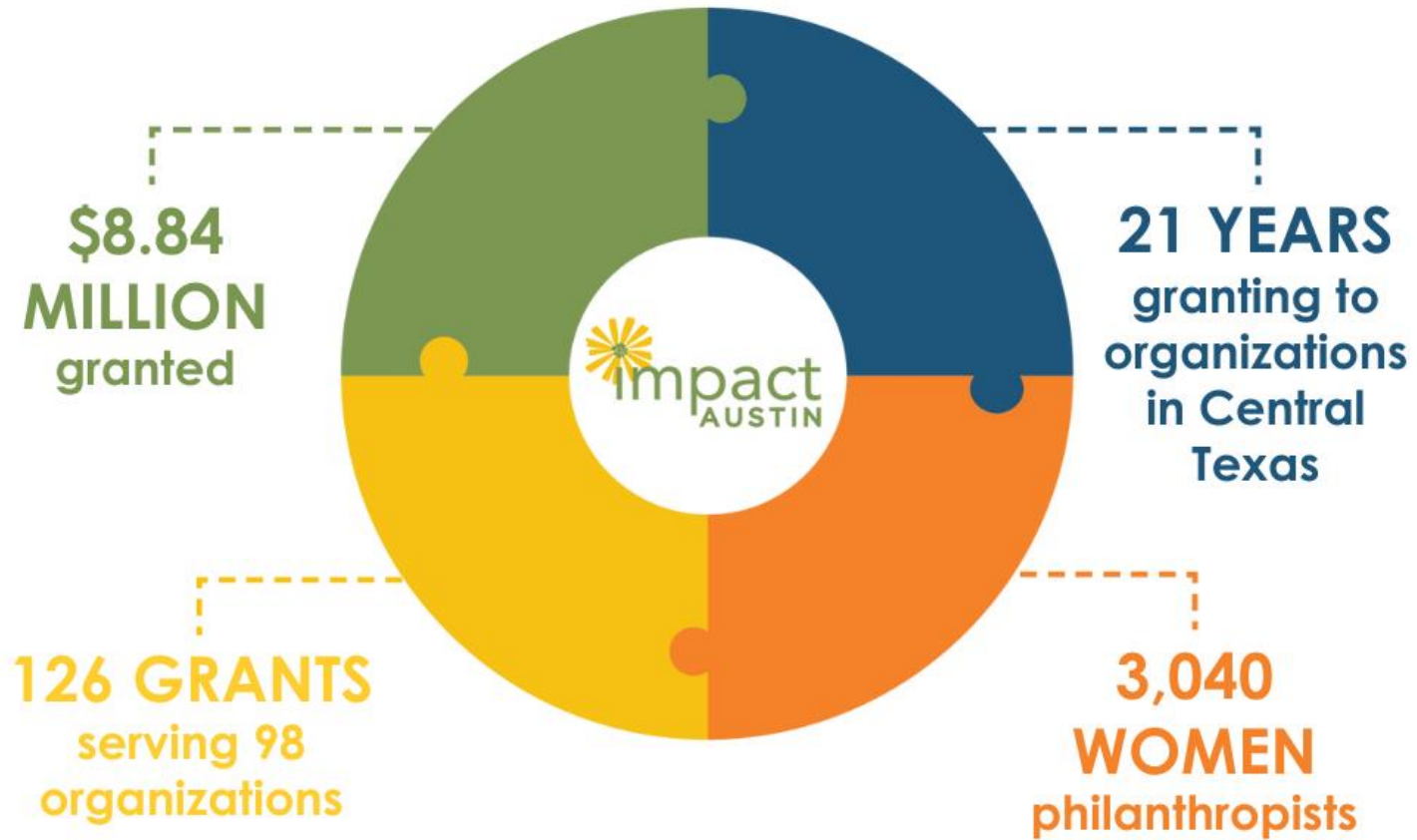   Lisa Barden, Executive Director, Keep Austin Fed

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Karen McLinden
Grants Co-Chair
Impact Austin

Our Collective Impact

Banking built for nonprofits.

Do you know how much your nonprofit paid in bank or transaction fees each month?

If the answer is yes, you already know how much fee-free commercial banking could move your bottom line. And if the answer is no, there's no better time to find out.

Stacy Armijo
Chief Experience Officer
sarmijo@goamplify.com
www.goamplify.com

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Elaine Jensen
Nonprofit Coordinator
Impact Austin

What's New This Year

- **Impact Austin grants will be UNRESTRICTED this year**

- Single grant cycle for 2025

- Three focus areas will be awarded: Community, Education, and Health & Well-Being
  - An Equity lens will be applied across all focus areas

- No initiative budget will be required as part of the financial attachments to the application

- Grant amounts for 2025 are $80,000 for primary and $18,000 for secondary in each area

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Grants Overview

- A Grant Proposal can:
  - Support programs or projects: existing programs or projects or new programs that target a specific population and aim to achieve specific, measurable goals; and/or
  - Support capacity: strengthen or grow a nonprofit organization to improve its future performance, impact, and sustainability producing measurable results for the organization; and/or
  - Achieve outcomes to support the overall mission and vision of the organization

- Grant amounts are based on Impact Austin membership levels

General Eligibility Guidelines

- An eligible organization must:

  - Be a public charity with tax-exempt status under Section 501(c)(3) of the IRS Code

- An eligible organization must:

  - Provide services in Bastrop, Hays, Travis and/or Williamson counties

  - Use the entire grant amount (no partial grants)

  - Identify the focus area for the application – Community, Education or Health & Well-Being for 2025

  - Organization must not have received an Impact Austin Grant within the time frames posted in the Impact Austin Grant Application Guidelines

What We Will Not Fund

- We will no longer restrict the use of grant funds by an entity; however, any restriction placed on 501(c)(3) organizations by law or IRS rulings must be followed; such as political lobbying or legislative activities. The 501(c)(3) organization is responsible for such compliance.

- In addition, we will not fund the following:

  - Sports teams or competition

  - Fraternal, sectarian, and religious organizations where the grant is intended to principally benefit of the organization's own members/adherents, or to fund inherently religious activities

  - Private foundations

2025 Grant Areas

G3 GRANT | APRIL 2025
To improve the lives of youth in the community

COMMUNITY GRANT | JUNE 2025
To enhance economic, social, environmental or cultural initiatives

EDUCATION GRANT | JUNE 2025
To enhance education and learning

HEALTH & WELL-BEING GRANT | JUNE 2025
To strengthen and enhance the lives of children and families or positively impact the mental or physical health and wellness of people

* FALL | 2025
No Fall grant cycle

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Key Criteria

Credible – organization is reliable and trustworthy; has a strong record of achieving its goals; has a solid reputation within the community

Capable – organization can turn good ideas into reality; has competent and qualified staff, as well as the structure and systems to achieve its goals; strong board; sees becoming as diverse as the community it serves as a goal; prior success

Committed – organization considers operational needs in terms of mission; is committed to serve the community with or without us; has a plan to continue the work beyond our grant

Significance and Impact – organization addresses important needs within the community; works to resolve the issues; has clear understanding of the primary population it serves; considers diversity, equity and inclusion in decision making

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Review Committees

The Grant Review Committees (GRC) are responsible for implementing Impact Austin's grant process and choosing two finalists per focus area. Members complete training on Impact Austin guidelines and grant evaluation.

The Grant Finance Committee (GFC) consists of Impact Austin members with strong financial experience and skills who serve as financial consultants for the grant review committees in the review of financial information provided by the nonprofit organizations.

Application Recommendations

- Ways to strengthen your application

  - Tell us your story – persuasive community need

  - Get objective feedback from others

  - Impact – How this money will affect others?

  - Grant Category – What made you pick this one?

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Reasons Not Moving Forward

- Competition

- Financial Data Errors

- Similarity to Other NPs

- Current Events

- One Person-centric Organizations

- Success not Defined

- Organization Readiness

- Site Visit Preparedness

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Girls Giving Grants (g3)

- Girls Giving Grants (g3) is the youth version of Impact Austin. Each girl (in grades 8-12) gives $125 of her own money, with $100 of that amount allocated for the community grant. Girls are trained on many topics, including community needs and how to assess grants.

- Since 2006, g3 has awarded $124,100 in grant awards. The 2025 grant award will be $6,500.

- The g3 grant cycle runs concurrent with the school year. The application window is open for the g3 grant during the month of October. The recipient of the g3 grant is selected in April.

- Grant funds support youth programs in Travis, Hays, Williamson and/or Bastrop counties.

- Nonprofits may apply for this grant in addition to, and separately from, the Impact Austin grant process.

- Information about the g3 Grant is available at impactaustin.org/apply-for-g3-grants.

- For questions about the g3 grant, contact g3@impactaustin.org.

Fay Evans-Martin
Nonprofit Coordinator
Impact Austin

Grant Process Overview

Grant Application Process

Phase I: Grant Application

Phase II: Site Visit

Phase III: Presentation and Vote

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Phase I : Grant Application

The Grant Application describes your organization with supporting documentation and should clearly answer how this grant will advance your overall mission and how will you measure success.

The Grant Application asks about six topics:
- Organization
- Equity Lens: Diversity, Equity, Inclusion and Belonging
- Intentions
- Constituency and Community Involvement
- Why Now?
- Additional Information

Required attachments include organizational financials, audit,
 Form 990, litigation

Phase II : Site Visit

Three organizations are selected by each Grant Review Committee for site visits.

Applicants selected for a site visit will host members of the Grant Review Committee at their facility or a location of their choice. Site visits may be held virtually if required by the nonprofit.

Purpose: To meet the people behind the organization and gain first-hand observations and impressions

- Part 1: Introductions, tour, project or activities overview by applicant
- Part 2: Panel interview / Q&A
    - Executive Director
    - Project/Program Director
    - Board Member
    - Financial Representative

Following the site visit each Grant Review Committee will select two Finalists to attend the Annual Meeting for 2025.

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Phase III : Presentation and Vote

- If you are selected as a finalist, there will be a Finalist Training session on May 12, 2025, to give you all the necessary information
    - The Finalist Packet includes the Finalist cover letter, Finalist Report, and a brief video
    - The materials are prepared jointly by Grant Review Committee (GRC) Chairs and the nonprofit and are provided to the full Impact Austin membership
- Voting this year will be done during the Annual Meeting on June 9, 2025
- The nonprofit with the most votes in each focus area will receive the primary grant of $80,000; the nonprofit with the second most votes will receive the secondary grant of $18,000
- Members and Finalists are notified of awards at the Annual Meeting

Key Grant Dates

2025 GRANTS

01/08/2025 - Impact Austin 2025 Nonprofit Workshop

01/08/2025 - Grant applications open for submission; Grant amount announced

02/03/2025 - Grant applications close at 5:00PM CT

03/14/2025 - Initial grant review decisions communicated (6 in each category)

04/11/2025 - Semifinalist decisions communicated (3 in each category)

04/24/2025 - 04/26/2025 - Site visits

05/09/2025 - Finalist decisions communicated (2 in each category); all other applicants declined by this date
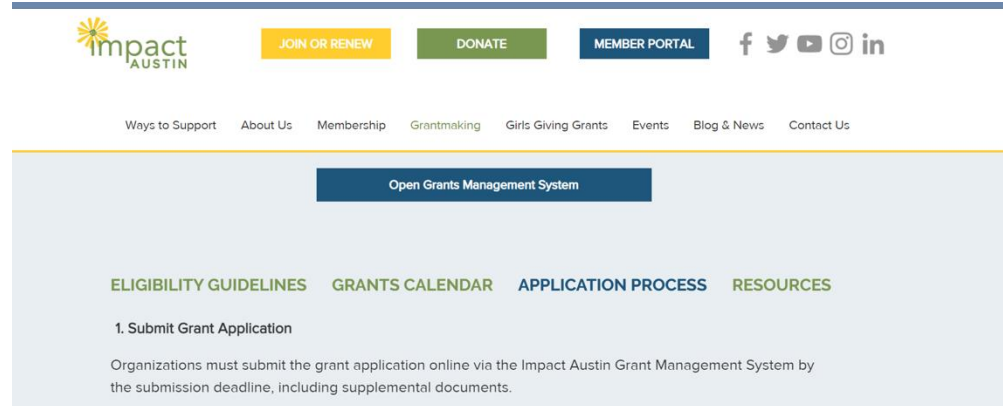
05/12/2025 - Finalist training

06/09/2025 - Impact Austin Annual Meeting; Community Partners announced

June 2025 – Grant awards issued

Grant Management System

- Impact Austin will start accepting Applications for 2025 Grants starting Jan 8, 2025.

- All grant proposals must be submitted using the Impact Austin Grant Management System

- Access the Impact Austin Grant Management System with the following link: https://webportalapp.com/sp/ia_grant_application or go to the Grantmaking section on the Impact Austin website at http://www.impactaustin.org/grantmaking. (Look for this blue box: "Open Grants Management System")

- Start applications early so we can assist with questions and issues!!

- Do not try to log in to the member portal for grant applications.

- If you have any questions, contact us at grants@impactaustin.org

Grant Management System

Sign In

Email

Password

Log In   Forgot your password?

Need an Account?

Sign Up

You will see two options

1) Sign In

2) Need an Account?

- Most of you will use the "Sign In" option—**only** use the "Need an Account?" option if your organization has **never** applied for an Impact Austin grant

- If your organization has previously applied for an Impact Austin grant, the organization has a profile in the grant management system—do **not** use the "Need an Account?" option to create a duplicate profile

- If you do not know (or want to change) the email or password associated with your agency's profile, email us at grants@impactaustin.org

- Your agency cannot have two emails associated with the profile, but we can change the login to a new email and allow you to reset the password

Grant Management System

- If you accidentally create a duplicate agency profile and the grants management system will not let you save your application because the agency's EIN is already associated with a profile, STOP and contact grants@impactaustin.org (We can fix it!) Do **not** attempt to alter the EIN and proceed

- **Only** if your organization is new to Impact Austin, use the "Need an Account?" option, and you will be prompted to create an agency profile as part of the grant application process

- Do not enter a space or dash in the EIN field, because the last number will be truncated, and the EIN will not be valid

- Consider using a generic email address as your login to facilitate access by other employees or outside grant writers. This can be done when you initially create the profile or changed by us at any time

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Lessons Learned

Lesson 1: It will take time to gather and upload all the requested supporting documents that need to be filed with the Grant application

Lesson 2: It is important that you provide all the requested financial information — ask us if you have questions

Lesson 3: Review your entire Grant application carefully, especially the financial attachments, with more than one set of eyes if possible

Lesson 4: Submit your application before the last day to avoid internet glitches, etc.

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Financial Requirements

- All required financials documents (see slides 29-31) must be submitted with the application

- Please double check your submission to be sure all required documents are included. Missing, incomplete, or incorrect financial documents may disqualify the nonprofit for this cycle.

  - If you do not have data for a specific item (e.g., Litigation, Audit), upload a note stating that you do not have this data, or it is not applicable.

  - Submit before the last day so there is time for you to double check what you submitted.

- If your application is selected to move on to the site visit phase, you will be asked to provide proof of insurance.

- If you have questions about the financial documents, please contact grants@impactaustin.org

Required Financial Documents

Organization Financials
- *Statement of Activities* (Income and Expenses) for the most recently completed fiscal year – no older than 14 months before the Feb 3 application deadline. (Nov 2023)
- *Statement of Financial Position* (Balance Sheet) for the most recently completed fiscal year - no older than 14 months before the Feb 3 application deadline (Nov. 30, 2023) and most recent month-end - no older than 2 months before the Feb. 3 application deadline (Nov. 30, 2024).
- *Current Year Organization Budget with Year-to-Date Actuals vs. Budget* – no older than 2 months before the Feb 3 application deadline (Nov 2024).
- You may use your own financial statement forms or the Impact Austin forms provided in the application.

Financial Narrative
- Explains any key items on the financials that would not be obvious to those outside the organization

Audit, financial review, or compilation

Form 990 (most recently filed)

Required Financial Documents

Funding Sources
- List of entities (e.g., Foundations, Corporations, Governmental agencies, etc.) funding your organization for the current year and most recently completed fiscal year.

Litigation
- List of actual or threatened litigation or regulatory proceedings, investigations, or governmental actions involving your organization in the last two years with a brief description of the basis for each.

If you have questions about the financial documents, please contact grants@impactaustin.org.

Sample Financial Statements

- Statement of Activities EXAMPLE

- Statement of Financial Position EXAMPLE

- Budget vs. YTD Actuals EXAMPLE

Community Partner

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Q & A

Moderators:
Elaine Jensen, Impact Austin Nonprofit Coordinator
Fay Evans-Martin, Impact Austin Nonprofit Coordinator

Panelists:
Karen McLinden, Impact Austin Grants Co-Chair
Margaret Ballinger, Impact Austin Grants Finance Coordinator
Lisa Barden, Executive Director, Keep Austin Fed

Additional Resources

Detailed information about the Grantmaking Process is available at
https://www.impactaustin.org/grantmaking

If you have questions, please contact Impact Austin's Nonprofit Coordinators at grants@impactaustin.org