



GATEWAY *to* GRANTS

INSIDER ADVICE FROM FUNDERS



INTRODUCTION

Welcome to Grant Proposal Finances. This document was put together to help organizations understand basic practices in financial management, so they can build the systems needed to win grant funding. The following pages include important information on nonprofit budgets and narratives, a glossary of commonly used financial terms, and interview with Gina Nocera, Program Officer of the Jared Polis Gift Fund, along with sample program budgets and operating budgets.

Gateway to Grants is a grants management firm, featuring services that meet the needs of growing nonprofit organizations. These include industry leading prospect research packages, grant writing and reporting, grants management services, project management and training. We will help you gain confidence in your fundraising strategy and build a legacy for the future of your organization. Work with Gateway to Grants and stop missing important opportunities for funding today.

MEET THE FUNDERS:

PETER DROEGE is the former Communications Director at the Daniels Fund and the current Executive Director of Step 13. Peter talks about Bill Daniels, the founder of the Daniels Fund, and the types of programs they support today.

GINA NOCERA is the Executive Director of the Jared Polis Foundation, a private operating foundation that focuses on programs. Gina shares how their review committee selects grantees and how to make proposals stand out from the crowd.

JENNIE ARBOGASH is the Executive Director of Social Venture Partners, a nonprofit that builds relationships between donors, volunteers and organizations that are out to change our world. Jennie talks to us about this unique grant making organization in Boulder.

Interviews are conducted by one of our consultants, Amanda.

PETER DROEGE COMMUNICATIONS DIRECTOR THE DANIELS FUND

Amanda: I'm here this morning at The Daniels Fund meeting with Peter Droege, the V.P. of Communications. Good morning, Peter.

Peter: Good morning.

Amanda: Can you tell me about the background of The Daniels Fund and Bill Daniels?

Peter: You bet. The Daniels Fund is a private foundation that operates in Colorado, New Mexico, Utah, and Wyoming. We have two funding areas: our Grants Program and our Scholarship Program. Our Grants Program funds in areas including aging, amateur sports, alcoholism and substance abuse prevention, disabilities, homelessness prevention, education, and youth development. Our Scholarship Program operates two programs: the Daniels Scholarship, which provides approximately 250, four-year college scholarships each year to students who come from families in financial need. It's not so much an academic scholarship as it is a scholarship that recognizes qualities that Bill Daniels admired, such as character, integrity, honesty, a willingness to give back to the community. So, these are all, 250 terrific young people who get this scholarship each year. It allows them to go to any college or university. Our second Scholarship Program is the Daniels Opportunity Scholarship and that is a different program. We actually allocate grants to colleges and universities across our four states and then they, in turn, allocate that funding according to the criteria that we agree upon to students who might be adults returning to college, students that are coming out of foster care homes, juvenile justice facilities, returning military, or folks that are studying to be first responders, such as EMTs or firefighters.

Amanda: Thank you, and can you tell me a little bit more about Bill Daniels?

Peter: You bet. Bill Daniels was born in Greeley, Colorado in 1920. It was during the time of economic upheaval in the country. The Great Depression was something he really grew up being all too familiar with. His family was impacted by The Great

Depression, his father lost his job and, in turn, they had to move in with his maternal grandmother in Omaha, Nebraska just as a way to provide for their means. It took quite a few years of real hard work and diligence on the part of his father to really land a new opportunity, which was in Hobbs, New Mexico. His father operated an oil insurance business there and so the Daniels family moved there when Bill was about 17. He only lived in Hobbs for a couple of years and then went to the New Mexico Military Institute. He always valued that time spent at the New Mexico Military Institute. He felt it gave him discipline, and he learned a lot about teamwork and some very valuable skills in life. After being at the New Mexico Military Institute, he became an aircraft carrier fighter pilot in WWII. He flew about 500 missions, was decorated many times. He also served in the Korean Conflict and when he concluded his military service, he opened an oil insurance company in Casper, Wyoming. He quickly came across television. He was fascinated by the new technology and learned about how to bring the television to Casper. There was really no television there because, television, at that time required a line of sight broadcast and there was a mountain range that prevented Casper from receiving television. So, he investigated the various technologies, realized that cable television would be the best solution, brought cable television to Casper, realized that it was a really up-and-coming business. He went on to own about a thousand cable companies across the United States and is known in some ways as “The Father of Cable Television.” During all of that time, he was known for his kindness and generosity to people in need, very extraordinary generosity, even when he had very little money himself. It may have been the experience of growing up during The Great Depression which really helped him to see just how hard poverty was on people and I think that’s partially the case. He was extraordinarily generous in really remarkable ways throughout his life. He never had children of his own and so when he died in the year 2000, his estate transferred to The Daniels Fund. He left very specific instructions for how the funding would operate and so The Daniels Fund is honored to follow his intention. We do our best to model his personal style of being engaged in the communities in which we serve, and we do our best through our Grant Program Officers as well as through our Scholarship Officers to maintain a presence and strong relationships across our four states.

Amanda: Thank you so much. It sounds like he was really committed to quality of life and human services.

Peter: Very much so.

Amanda: Can you tell me about some of the most innovative projects that The Daniels Fund supports now?

Peter: Certainly. That's a terrific question.

Amanda: I know there are many.

Peter: Yeah, and they are great and small. I'll tell you about one that I was at just this last week. It's the 1224 Club up in Casper, Wyoming and it was founded by a small group of folks who understood the need in that community to give people access to Alcoholics Anonymous meetings. There is, unfortunately, a fairly high level of alcoholism and drug abuse in that area and folks really need the support of being able to attend meetings when it works for them. So, from very humble beginnings, they've developed the program. They, recently, were able to purchase, really quite a large building. The 1224 Club occupies the second level of the building and they leased out the space on the first level to folks like the Casper Drug Court. So, when youth get in drug violation situations, instead of going to prison, they can go to Drug Court and get treatment and, actually, the 1224 Club is right upstairs. It provides a lot of support. There's also a high school there called Reach High, and it's for students who have gotten involved, again, in drug and alcohol abuse and it provides them with the support that they need in order to complete high school and to get a diploma. It's actually a public high school there. And then there's a program that is, just really outstanding, it's a culinary arts school. Being a chef is something that not many of us think about, but for this population of young people who have had some problems in life, being able to get the trade of being a chef is something that would allow them the opportunity to work no matter where they live. So, it's a really remarkable, innovative facility and when I was up there last week, they said it just wouldn't have happened without The Daniels Fund's support to help them with the capital improvements on the building that they had purchased. We're also really delighted, within just in the next week or so, we are doing a hard hat tour of the new Denver Hospice. It was once called the Hospice of Metro Denver. They just recently changed their name to Denver Hospice.

For many, many years, they were doing wonderful, wonderful work at a facility that really had become quite dated. You know, quality of life was so important, as you mentioned, to Bill Daniels and even up to the very end of life, it's very important for folks to be treated with respect and to have their families able to visit them in a dignified, high-quality environment and the Denver Hospice is just...they set a very high standard for creating that kind of quality of care. So, they are building a great new facility out on the Fitzsimmons campus and The Daniels Fund is helping make that possible. We also fund a couple of different hearing programs. Towards the end of his life, Bill Daniels almost completely lost his hearing. It was one of the things that he most regretted in his life because he was such a social guy. If he came in to meet you, Amanda, he would want to know about you and hear about your family, and what your dreams and goals are. He loved to meet people, but when he lost his hearing, it really limited his ability to interact with others well. Whether it was on a one-on-one basis or in a group setting, so he loved to go to dinners and to meet people, but with that hearing loss, he just simply couldn't hear what people were saying. And he, frankly, said he felt kind of embarrassed about that so, honoring him, we provide funding for a number of hearing centers. Like many large foundations, we do lots of support for emergency services such as food banks, Food Bank of the Rockies here in Denver, which provides food across the state. We also help bring the Food Bank of the Rockies to Wyoming and make it possible for the Food Bank of the Rockies to expand up there and to provide food delivery across the state there. We provided a million-dollar grant to the Roadrunner Food Bank in Albuquerque, New Mexico, which is similar. It's the central food bank that provides food bank services to the entire state for nonprofits, food banks, all kinds of agencies. We've been able to do some really remarkable things in amateur sports. It's kind of a unique niche. I don't know very many foundations necessarily fund amateur sports. Where we focus on there is quality coaching. Especially for urban youth, to be able to participate in a program like Gold Crown, or The Police Activities League, or others, they're able to get in there and have quality coaching. That means so much to a young person who might not be in a two-parent family and learning about sports helps them to understand teamwork, discipline, and sportsmanlike conduct in those things. We are very supportive of those types of programs and so education reform...I'll close just...I can go on and on...I'll just say in education reform...that's a key area of funding for us and we have some really exciting grants out there in education reform. We've been very supportive of the charter school movement [and] public schools.

Amanda: So what's the average grant size? Or maybe you could give a range?

Peter: It's difficult to say, really, because we do provide grants in the range of, anywhere from \$5,000...it seems that, often times, they might be \$20-25,000...you see quite a few of those grants go by, but \$50,000 is not uncommon and even in the range of hundreds of thousands or even millions of dollars. It just depends on the program. We typically won't provide more than between 10-20% of a program's overall budget...operating budget because we want to be sure that the community is supporting the folks that are engaged in this nonprofit. Whatever folks need we would encourage them to get in contact with us, and I can, if you'd like, I could talk a little bit about the process that we have for submitting a grants proposal. That might be helpful for folks to know as well.

Amanda: Sure, please do. And in that, I just wanted to ask if you could address one of the common weaknesses or areas that you see in proposals that need strengthening, where the people should maybe pay a little more attention to.

Peter: You bet. The first thing I'd want to mention is that folks are invited to submit a proposal at any time. They don't have to be invited to submit a proposal. There are no deadlines that they need to meet. They are invited to submit a proposal at any time throughout the year. You want to make sure that your organization, of course, and the project would be eligible for funding. The easiest way to do that would be to just call us and have us send you a grant brochure, or all the information is on the website. As I mentioned, Bill Daniels was very specific in terms of the funding areas that he wanted us to provide community investments in. And so, what we find is that the number one reason why a grant proposal would not be considered, would simply be that it just doesn't fit within our funding strategies. And we often hear from folks that even if they are not eligible for a grant, they're grateful for how clear our funding strategies are. It is very specific and so all they need to do is go to our website and they'll see very quickly if they're eligible. If you look and you see that you are really not eligible, the idea that maybe you could modify one of your programs in order to adapt it in order to become eligible, is usually not a good strategy for us. If you are eligible, we want you to apply for a grant, but if you're not eligible, then we wouldn't want people to take valuable time to submit a grant application. That just simply wouldn't fall within our strategies. So, if you have any questions, first of all, we want folks to call us. And if you call in at the front desk and just say, "I've got a question about grant strategies," our front desk knows exactly who to transfer that call to. It would be Tammy Brown. She's our Grants Administration Officer and she's really the first stop and most knowledgeable person on our team. It's not necessary to know Tammy's name, but that's who it is.

Amanda: That's great, thank you. I think people are afraid to make that call. Often, they don't know if the communication is going to be open.

Peter: No. We encourage that. You can prepare a proposal, everything that you need is included on our website in our grants guidelines. At the very back of the guidelines, it's just a couple of pages that offers all the information that you'll need. We do...I will say, we think that the Common Grant Application is a valuable tool for nonprofits and for people who are involved in grant writing, but we do have some different information that we ask for. So, we don't accept the Common Grant Application as it is, but for someone who really doesn't know very much about how to write a grant, it offers a valuable resource, but we would also want them to be sure to get our grant guidelines so that they would see where we differ and for some of the other types of information that we ask. We ask people to just mail an unbound original to us. It doesn't have to look fancy or [have] color on every page. Just mail the original to us and then you'll hear from us. We try to get back to you within even ten days that you'll be notified in writing of our decision within about three months. So, we try to make it as user-friendly as possible.

Amanda: Thank you so much for all this information. I have one last question and it's a little bit of a broad question, but when you're looking at sustainability of an organization, and I think you kind of answered this in the first example you gave of the center in Wyoming...

Peter: Yeah, the 1224 Club.

Amanda: It sounds like there are some strategic partnerships there that they are working within the community with the high school, with the chef program, and with the drug courts.

Peter: Where there is this network of community support and a lot of folks who are getting behind the organization, it does make a difference. And there are plenty of examples of organizations like that, that people just pull together, especially in rural areas. We find that to be, really, the hallmark of a great nonprofit initiative, where leaders in the community are pulling together to solve an urgent need that's taking place within that community. So, that urgent need can come in many forms. For us, it might be a baseball park...and we certainly have done that in some rural communities. They really need a baseball park. In other communities, like in Delta, Colorado, they have a program there called the Delta Model of Meth Prevention.

And we're real believers in it and the whole community gets together to support someone when someone is arrested or on a drug abuse charge. The best course of action for them may be not to put them in prison. What the people in Delta believe, the best course of action is to bring together community support of all kinds to help that person be able to overcome the addiction, to be able to put their life back together, and to eventually become a productive, tax-paying citizen again. And, it's been proven very successful and it involves all kinds of folks in the community. Again, where there is that kind of exciting support from the community, we really do notice that and it does make a difference.

Amanda: Thank you so much for your time and for this information. I think this will help improve the quality of the proposals that come in this year.

Peter: Well, thank you very much, Amanda, and we are grateful for the opportunity.

GINA NOCERA EXECUTIVE DIRECTOR THE JARED POLIS FOUNDATION

Amanda: Today, I'm with the Jared Polis Foundation meeting with Gina Nocera. Good morning.

Gina: Good morning.

Amanda: Gina, could you tell me a little bit about the foundation's four interest areas and the types of grants that this foundation gives out?

Gina: Sure. First of all, I guess I would start by delineating between the foundation and Jared's Gift Fund. The Jared Polis Foundation, which you can learn more about at jaredpolisfoundation.org, is a private operating foundation that started in 2000, and we really run programs or support programs and charter schools that we founded. That is not the grant-making arm of Jared Polis, the philanthropist. So, the Jared Polis Foundation is separate, and his actual grant-making arm is here at The Community Foundation in Boulder County. We have a donor advised fund here and we call it the Jared Polis Foundation Gift Fund. Though let's delineate between those two and to learn more about the gift fund our four focus areas are education, health, or healthcare, environment and diverse communities. The diverse communities' piece, we wanted to leave it somewhat open. We don't want to be too narrow in our giving and so when I say diverse communities, in the past, if there is a precedent for it, we really focus on the Jewish communities, the LGBT communities, the Latino communities, or any diverse community as far as ethnically speaking. Anything around basic needs...the homeless community, they all fall under that focus area.

Amanda: Can you tell me a little bit more about health then?

Gina: Health is interesting. That's probably our least competitive focus area. We're always looking to receive more applications and beef up the health area. When we talk about health, we really want to support people who are low-income, unemployed, working poor, children, mothers, people who need healthcare and don't have access to it. And we really like to support groups that provide direct services, not necessarily advocacy groups, and I would say that's the case in all of our focus areas, but health too.

Amanda: Ok, what about disease and disability? Does this fall within or is it more public health?

Gina: If they are providing a direct service for the target population that I mentioned, around disease or a disability, I think that they could fall into that category. And because it is our least competitive area, they have a better chance of being funded if it seems a little loose.

Amanda: Ok, thank you. So, can you tell me, what was maybe the most interesting project or the most innovative program that this foundation funded in the last year?

Gina: In many ways, there are a lot of them. It's hard to sort of pick one. But, one organization that really sticks out in my mind and in our grants committee mind, the group that helps me make the decisions and they are all volunteer, is a group that just surprised us. We don't have a lot of guidelines or structure around saying, "oh you know, three years on for funding, three years off." Or, "no new grantees this year." Or something like that. We don't do that because we're small and we're like an individual giving organization. We don't want to put so much structure and restriction. So we had a new grantee, this year, apply. And obviously we're going to look at those applications with even more scrutiny because they are new to us. And we don't know them as well. And we were so happily surprised by Wildlands Restoration Volunteers. They are an environmental group based here in Boulder and they are completely active in getting volunteers to work on trails. And to rehab the trails to make the trails habitable for people, to secure and maintain the wildlife and the ecosystems around it. And I've seen their trucks and I've seen them out there and, you know, in Boulder County you think, "Ok great. I mean, of course you would expect a group like this." On the surface, it doesn't seem that innovative, but when you read how they present themselves...it was so pleasant and so surprising for every single committee member and there are five of us to read that application because we felt like we were there. They walked us through it so clearly, so succinctly, in such a way that it was a joy to actually read the application. There were no questions left unanswered, and at the end of it, we gave them what they asked for. They asked for five thousand dollars and we gave them five thousand dollars. And often times we don't fully fund what their request is. We fund a part of it. Let alone if they are a new grantee. So, it was because of the way they presented themselves with no questions. And now when I see them out, because I run the trails all the time and I'll see them out, I know exactly what they do because of how they can present themselves on paper.

And it was done in a way that was so genuine and sincere and that they live and breathe it every day...it wasn't done from this glossy, glitzy, "hey, we're trying to showcase us and give you these fancy annual reports and all these pictures." It wasn't that. It was just the way they talked about themselves in the narrative and that every single attachment made total sense as well. So that was really impressive and that was in our spring cycle.

Amanda: So, it was really good story-telling and covering all of the bases?

Gina: Yes! And all of the things that we asked. And a couple of the things we really look at are evaluation. How do you evaluate your programs? How do you evaluate what you do? And truly show us that you do it, both qualitative and quantitative. And when you show it to us, make it enjoyable to look at. Don't mire it in words and footnotes...like...make it bullet points, make it a chart. That's fine. But make it easy for us to understand and I would definitely recommend that somebody outside the organization who they know is a good communicator – a good reader, a good writer, a good analytical thinker, read that application carefully...outside of themselves...their internal circle. Because I think sometimes, they are just so connected to it, they don't see what we see.

Amanda: Thanks. So, one of the things you touched on was the review committees. I want to ask you a little bit more about that. And just tell me, who's on your review committee and how that process works.

Gina: Sure. We're a little unique in many ways. I mean, our philanthropist is unique. You know, Jared Polis is our congressman here in CD2, and...congressional district 2. He's always been an entrepreneur. He became wealthy very young. He's always been involved in philanthropy and giving, and he's always been involved in politics. When he actually ran for congress and won, he had to step back. So, he and I had conversations about it...and what we decided to do was: I would continue to manage his grant-making through his donor advised fund here at The Community Foundation, but that I needed support to help me with that...to make sure we were being as transparent and objective as possible. So, we chose folks who we trusted and knew, who we would have good relationships with. And I chose a community banker here in the area who has worked with Jared on different aspects of his giving in the past, and he had a great relationship with her and so do I, and she also helps with her bank giving, so she understands philanthropy in that aspect. I chose two program officers, one from The Community Foundation and one from The Family Foundation because they understand the whole funding process.

And then I chose a consultant. We needed somebody...like an environment person since that is one of our focus areas, who is an environment consultant, but in the past worked for a large non-profit organization to close Rocky Flats. So, there was that political, governmental, environmental piece. So, he's great. He loves our committee and, we kept it small. We kept it diverse in its points of view, as much as we could, and I wanted to make sure we had good relationships – we all got along and we all were getting on the same page and just keep it about the grants and about the giving. And it has been the same committee now for...well we'll be finishing up our second year. And, we're learning a lot as a committee. What we did in the first year, we tweaked in the second year a little bit. We added letters of interest. So, by adding a letter of interest in 2010 and saying no sweat equity really into this, give us a one-page LOI. It says who you are, what you're requesting, attach your 501(c)(3) and attach your operating budget for the year. You'll hear back from us in two weeks, on the dot, asked if you're going to be invited or not to apply and why and then you have 30 days to get the application in. So, September 15th is our next, you'll hear from me with your LOI September 1st, you'll hear from me on September 15 and the application is due October 15th. And then, we have a few weeks, several weeks, to read it, review it, and meet. And, you'll receive...you'll hear from me and receive your grant award by mid-November if we're talking about the fall cycle. You know from beginning to end. And that's how we wanted to keep it. We know it is important to keep it moving, we are not this huge foundation. We don't have this bureaucratic system to go through.

Amanda: It sounds like you have some experts from different areas that can look at the proposals with different eyes to see where the strengths are, can you tell me a little bit about...what are some of the biggest problem areas that you see or what's the most common reason that a proposal would get turned down?

Gina: Well, I think a couple of the things are when they actually get to the proposal point, if they made it through the LOI process, I always tell organizations it's still competitive where we have a finite amount of money to donate every cycle. And, some of the things that stand out are their evaluation section. And we want to see that they actually evaluate their programs, how they evaluate the programs, and the data that they collect from those programs. Often times, organizations will say in the evaluation section, "we will do this," you know, "we will pass out surveys to our clients...like satisfaction surveys," or, "we will collect data on the outcomes of this program." Ok. What have you collected in the past?

Because one thing we don't do, is very rare, we almost never do it, is fund a brand-new program. Because we want to see that it is somewhat established and that there is some data behind it and then how they use that data - to tweak a program, or to strengthen a program...whatever it is. So that's a big part of it for us...is the evaluation and the data piece and that they are taking that seriously and informing themselves of their own success or not. And then secondly, of course, we look at the budget and financial health. So, we're going to look at your financials and we're going to look at your governance structure...very closely. We're going to say, "is the organization financially healthy? Are there any outstanding questions that we have after reviewing their current operating budget?" And sometimes, there are. That's why I highly recommend that a budget narrative is attached to a budget. Because, often times, they don't add up. Whatever is going on in a budget, or even in a program, like, and if you're asking for program funding, attach a program budget. And another thing we want to see that I always tell organizations is, "if you're asking us for support for a program, don't ask us for the full support for the program. Show us that you have other supporters. So if we're funding twenty percent of the program, who is funding the other seventy-five percent? Is it pending? Do you have an idea who is funding it? We hope so, because we are not going to fund you otherwise."

Amanda: So, these are things that can go into a budget narrative?

Gina: Absolutely.

Amanda: For someone who has never done a budget narrative before, can you just describe that?

Gina: I think of the budget and then I think of notes that follow the budget, and they could use bullet points that say, "in the revenue section, this particular line item...it connects to..." or, "let me explain this..." Like, literally, just attach notes that talk about whether it's the revenue and expense section, how they add up, how they don't add up, or even very specific line items. We do have three types of grants that we give. One of them is general operating which I know is difficult for many organizations. So, that's not going to have a program budget attach, per se, but your operating budget...it needs to be very clear. We also give programmatic funding and we give challenge matching. Which is probably our least requested - the challenge matching. What we always recommend, is if you're going to be a new grantee, ask for program support.

Unless you're a group like Wildlands Restoration Volunteers who could write the most beautiful application in such a genuine way that they literally blow our socks off, and we know that they are who they say they are, and they live it and breathe it every day, and it is clearly jumping out at us, we recommend then that you ask for program support in your first couple years. And then after you are an established grantee, ask for general operating, because, at that point, we have a relationship with you and we know, we totally 100% trust you to use the money...if you need to keep the lights on, you keep the lights on, because we trust your mission. We know who you are. So that's how we sort of recommend it. So, there is a lot around financial organization and health, target population impact, and lastly, there's a subjective piece to it in reading it. There's instinctual sort of gut...questions, feelings about an organization and so we leave the last section for individual recommendation. Would you recommend funding this organization based on its overall application? Do you think it's a good fit for our gift fund? If you do recommend funding it, would you recommend funding the requested grant amount or a different amount? And we kind of attach points to each of these, and so, there are fifteen points total, and so, we do look at the overall score but, comments have to go hand-in-hand. So, we always have sort of succinct comments from each committee member and that's where we start. We start with the scores, we start with the comments, and on our board when we have our decision-making meeting, we put definite "yes's," we put "maybe's" for discussion, and we put definite "no's." And then that's how we go through our process of figuring out and then we start attaching amounts to it based on what our budget is for that cycle.

Amanda: Thank you. I think that explains it really well. That is a clear idea of how this works. One thing I really advice non-profits to do is when they get declined, get all the information because you've spent a lot of time looking into that. Even if you have to say no, it can really help them learn a lot. Do you give the feedback?

Gina: I absolutely do. I'm kind of a one woman shop in that respect and so when they call, they will get me. And if they don't, they'll get my voicemail and I'll call them back. And I actually...and I think most funders would agree with this, whether they are a small foundation or a large one, we want to hear from the organization both before they submit the application and after they submit the application. Maybe not during, unless we...cause we're in the process of compiling everything and organizing everything and if we need something, we'll call them.

It should all be there already and there are some organizations like The Denver Foundation that if something is missing, sorry, you're out of luck, you're going to have to apply for the next cycle, but I absolutely look at an organization that calls me up front and says, "here's what we're thinking of applying for...what do you think about that?" And they ask me all kinds of questions around, "what should we request as far as the funding range?" What's interesting to me is if we have a history of giving with an organization and say we gave...awarded them a \$5,000 grant last year and they ask for \$15,000 this year and there was no call to me. That's not strategic, and it's not strategic to our committee. Why didn't they call and ask?

Amanda: They are not building a relationship with you.

Gina: No. And we will get those kinds of applications where it's like...we've never heard from the organization, they've never been a grantee of ours and our range of giving is between \$500 and \$15,000 and they'll ask for \$15,000 for general operation. And it's like, that's not strategic on their end. There's no thought going into it. There's no phone call, there's no communication. And so that immediately to me sends up a little red flag. Why? Because I am available. I put all throughout our website - call me, email me with questions. And then the follow-up piece is very important too because I keep all of our committee's notes. We keep copious notes during our meeting as to things they could have done better, things that they did really well. And I'm happy to give that information to them. And in their award letter that they receive or their "thank you letter that we can't fund you this cycle" letter that they receive via email, I put "please call me if want further information. Please call or email me, here's my information."

Amanda: Ok. Thank you so much for your time. This is a lot of great information.

Gina: Great! Thanks a lot, Amanda.

Amanda: Thank you.

JENNIE ARBOGASH EXECUTIVE DIRECTOR SOCIAL VENTURE PARTNERS

Amanda: I'm here this morning meeting with Jennie Arbogash, the Executive Director of Social Venture Philanthropy. How're you, Jennie?

Jennie: I'm good! How're you?

Amanda: Good. Thanks so much for doing this. I want to talk to you about several things that are going on with your foundation, and can you tell me first about the concept of SVP?

Jennie: Sure. I'd happy be to. So, most people think of philanthropy as good people giving good money to good causes and Social Venture Partners does do that, but we really go beyond that idea of philanthropy. We build powerful relationships among the people who want to give back and the organizations looking to make change in the community and; we're really trying to look at, as a society, we are looking at very big problems, but we know there are people out there with the potential to solve those problems if we can get people together to look at things together. We really see Social Venture Partners and the concept of us is really about bringing people together to unleash that potential and create change. We build relationships between donors, volunteers, nonprofits, folks who are involved in social enterprise and other ways of doing social good, and then we strengthen organizations together and we strengthen the individuals who want to give back to our community and create change.

Amanda: So, who are some of these individuals? What can you tell us about the donors?

Jennie: We have folks who have been involved for a long time and a little bit of time and I would say that really the donors who are involved in Social Venture Partners are just like you and me. They are professionals, members of the local business community, entrepreneurs, nonprofit staff, people who have the benefit of not having to work and just get really involved in the community. It's really any kind of person and it's really folks can give either \$2,500 or \$5,000 a year to Social Venture Partners and volunteer their time and have some kind of experience or professional expertise that they feel that they can give back to nonprofits.

The other thing that I think is really core to who these donors are is that they're people who want to learn more about the needs of Boulder County. They want to create change in our community, and they like doing it with other people that they have things in common with. So, it's really about doing it as a team.

Amanda: That's really amazing and unique. I think that young people can get involved and you don't have to be this wealthy person that's already created a family foundation that can give back. How long have you been in Boulder? How long has the organization been going in Boulder?

Jennie: We started in 2000 and we started as a fund of The Community Foundation here in Boulder County and we are part of a network though. I may be jumping ahead, Amanda, but we're part of a model that was started in Seattle in the 90s and there are now 25 Social Venture Partner affiliates around the world. In fact, we are very excited because the next one is opening in Bangalore, India in the coming year which is so cool. We've got one opening in Chicago this year. So, one of the things that's interesting is that we have this very local focus but we're also part of an international effort where there's more than 2,100 people around the world involved.

Amanda: Let me ask you about some of the projects that SVP is supporting locally right now. What are one or two that really stand out?

Jennie: We are currently working with four nonprofits in Boulder County and I'd very much like to highlight one especially. So, the nonprofits we're working with are The Wellness Initiative, Dental Aid, The Tiny Tim Center in Longmont, and also Bridge House in Boulder. Dental Aid is an organization that we've probably had one of our most exciting turnarounds with. So, we started working with Dental Aid in 2010 and we've done a lot of projects with them...more than I can even count right at the moment. But, the most important one was a fiscal of human resources overhaul, I would say. We worked on restructuring the administration, restructuring the staffing of the administration, establishing a fair compensation system for the dentists that worked there, creating a new cash flow model, creating a new way for them to collect the money they earned through earned income sources. We helped them with refinancing their properties.

Just a whole bunch of projects...there's a lot more, but the result is that Dental Aid went from being in significant debt when we started working with them and really having a hard time making payroll on that every other week basis to now having a zero-balance on their line of credit, being current in accounts payable, and having a multi-month reserve, and that all happened in a little over a year's time. So, you know, because of the work that we did together, really the impact is that they didn't have to sell any of their property or any of their important equipment. They didn't have to cut services to clients and instead they're right now looking at, "what more can we do? We have more people we can serve in the community." That's so exciting.

Amanda: I think that what is pretty cool about what I just heard with that is that they came to you when they were in debt, and I think a lot of organizations would be afraid to show the extent of their debt and the problems that they're having when they approach foundations. I think that's probably good news to a lot of listeners. You might still help them and that wouldn't automatically disqualify them. And my other question is, what you ended up helping them with - what they wanted help with when they first approached you.

Jennie: That's a great question. Not really...I think that they realized that they had challenges and they came to us and were very honest about the challenges they had and we did have to work together for a few months to figure out, ok, "what is the root of these challenges?" "What is the real problem here?" "What do we actually need to address first?" The first level of, yes, having to think differently about a funder and come and talk to Social Venture Partners and be really honest about what's not going well and what's not working...which is different than the normal experience. And then there's the next level is that we work together really in partnership between Social Venture Partners and the nonprofits. Just really delve in and take a look at, "what's really going on here?" and "what do we actually need to address together?"

Amanda: Ok. Thank you. I hear there are some new programs at SVP this year. Tell me about those.

Jennie: Yeah! Very excited. In the last year and a half, we have very much developed a new vision about how we want to impact Boulder County, and the result of that is that we are really going beyond the core part of what we do, which is grant and consulting investment in nonprofits, and expanding to a lot more educational services. We very much want to improve the quality of board governance in Boulder County, engage more young givers, get more nonprofit staff help with professional development - there's a lot of things we want to do and this has led to us developing a conference called Boulder County Board Match, which is for nonprofits come and meet potential board members and community members to really come and meet nonprofits and also learn more about what it means to be a board member and how they can do a good job in that role. We also have a Q&A online that's called, "Ask An Expert," where nonprofits can submit questions and get an online response to their question. We have a new program we're doing with the Nonprofit Cultivation Center called, "The Board Breakfast Series." So Social Venture Partners acts a lot like a membership organization in that all of our donors make big decisions together so every other year we vote on focus areas and we voted at the end of last year. This year and next year, our focus areas are Aging and Seniors, Homelessness and Housing, Early Childcare and Development, Social Enterprise, and Healthcare Access. Within those focus areas, we support nonprofits that serve at least 50% of their clients in Boulder County. We are locally focused. And also serve at least 50% low-income clients as well. We're in the middle of our grants process right now so the next time we'll be accepting applications is in January of next year, but I encourage folks to start looking at our website in the fall, because we'll start having information about it in the fall and always to call me if they have questions.

Amanda: And what is the typical grant range?

Jennie: Our grants range anywhere from \$10,000 to \$30,000 a year. And we usually support a nonprofit for three years' time.

Amanda: Great. I know that people are big fans of that multiple-year funding. Tell me about what kind of process you go through when you get that first round of letters and as you're reading through those, what advice can you give to some the applicants to avoid common mistakes and what are some of the things you look for?

Jennie: Sure. So we already talked a little bit about the biggest issue that's different with Social Venture Partners Boulder County and that is that we are really looking to work with nonprofits who have challenges that they're dealing with, who have things that they really need to work on and improve either because something's happened in the economy and that's affected them, or something has changed in their environment, or the area they're working in or donations have gone down. Whatever it is, we really do need to know what's really happening in that organization and not just get the sugar-coated sense of "everything's great here and you should give us money." The best advice I can give to nonprofits when thinking about applying to Social Venture Partners is to really be thoughtful in their initial letter to us about sharing. "Yes, we're doing all these great things, but these are the challenges we're facing and here's why – and because of that, we need help with these kind of projects" and could very thoughtfully give a detailed account of what kind of projects you think your organization can use help with.

Amanda: Right, I understand that there have been some changes with the Denver SVP, and can you tell me who the executive director is now over there and what their focus is this year?

Jennie: Yeah. SVP Denver supports organizations whose missions include Early Child Education, K-12 Education, and Youth Development programs. So, they really focus on kids and their new executive director is Pat Landrum. Like me, she is very interested in talking to nonprofits in the community and being connected, so she is very available as well. Their website is svpdenver.org. Our website is svpbouldercounty.org. So, it's pretty easy to find them and remember those.

Amanda: Ok. And, how accessible are you to having conversations with people before they apply?

Jennie: I actually strongly encourage it. We have a much more lengthy and work intensive grant decision-making process than a lot of foundations have. So, we want to make sure that we have spent as much time up front as we can to avoid any wasted time later on. So, if you're interested in learning more about Social Venture Partners Boulder County and what funding we do and whether or not your organization fits, I very much encourage nonprofits to first look at our website, read through the pages about funding, and then give me a call. I'm very happy to talk on the phone or meet in-person and definitely great to have those kinds of conversations between now and October so that once we are ready for the funding cycle, you know if it makes sense for you to apply and what you should be thinking about.

Amanda: Ok, thank you so much for your time.

Jennie: Thank you!

