



GATEWAY *to* GRANTS

**TIPS AND INSIGHTS
FOR NONPROFIT
BRANDING**



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 BRANDING EXPERTS:

JAMI FASSETT is the Founder of Up and Up Creative, a company that helps nonprofits use the power of branding to reach more people, raise more money and do more good. Jami tells us about what makes a good e-newsletter and the key components of an annual report.

MAC MACSOVITS is the Executive Director of the Rocky Mountain Down Syndrome Association, a nonprofit that strives to assure inclusion and enhance independence of people with Down syndrome. Mac talks to us about staying true to your mission and why he's so successful with volunteers.

MARCI WHITMAN is the Founder of Boomerang Marketing, a firm that supports small businesses & nonprofits with fresh marketing ideas, print design and online strategies. Marci offers advice on how nonprofits can use social media as a tool for fundraising and outreach.

Interviews are conducted by one of our consultants, Amanda.

JAMI FASSETT, FOUNDER UP AND UP CREATIVE

www.upandupcreative.com

Amanda: I'm here this morning with Jami Fassett, the Founder of Up and Up Creative. Good morning, Jami.

Jami: Good morning.

Amanda: I was wondering if you would tell us a little bit about your company and how you got started.

Jami: Absolutely! Well, thank you for the opportunity to be here today. At Up and Up Creative, we specialize in helping nonprofits use the power of branding, so they can reach more people, raise more money, and do more good. I started the company in 2011 after a career of being in both the nonprofit sector and working in a design and branding agency. When I stepped out to start my own agency in 2011, I really wanted to model it after what has been the most rewarding and fulfilling in my career, and that's really helping people and helping communities. So, I started Up and Up Creative to work with organizations on the "up and up," and help them go "up and up."

Amanda: Thank you. So, we submit a lot of grant applications here, and we often encourage our clients to include a recent newsletter with their grant proposals and grant reports. We think that's a great way to keep funders up-to-date on what's happening within their organizations. I'm wondering what you think are some of the key components that they should include in those newsletters.

Jami: Absolutely, that's a great question. The number one tip we have for nonprofits is to resist the urge to just slap together your newsletter with whatever news is currently going on and instead to take a very strategic and intentional approach about your content. Whether you're instigating a new newsletter program or if you've been doing one existing, we encourage all of our clients to sit down and think about, "who's your audience for this newsletter?" "What do they care about?" and then "what are your actual goals for this newsletter?" And then once you have that clearly

established, is to sit down and decide what consistent content areas you'll have in your newsletter each time. So, one of the examples that I'll use throughout this key point is, we were working with Rocky Mountain Communities and we sat down with them and identified five consistent areas that they will use in their newsletter each time. And that was a main feature that will highlight a real person whenever possible, a program highlight, a cause update, a donor spotlight, and an event update. What this does by using consistent content areas each time is two-fold. One - it makes your content of your newsletter more inviting for your audience and it also makes things a lot easier for the organization internally when you have a really clear plan for what stories you need so that you can delegate that much easier.

As far as the other components, the second thing is to talk about your impact, not just your activities. Don't get wrapped up in the idea of just sharing news. Make sure you're talking about what difference you're actually making and then highlight real people whenever possible. Impact is most easily communicated through the story of a real person. Your audience will be able to connect with a real face, a real need, a real tangible example of what you do and why it matters. With the Rocky Mountain Communities example, there was a story...a featured story about their after-school program and instead of just listing when and where it was and how many students were helped; we really highlighted the story around this seventh grader, Musa, who has a great, shining, smiling face, and we highlighted the impact that, because of this program, he jumped two levels in his reading! It makes a real emotional connection with your audience.

The fourth thing is to remember to show appreciation of your donors. It's not just about the news of the organization and don't get caught up talking about all the great things that you, as an organization are doing, remember - it wouldn't be possible without all of your great donors and volunteers that support you. You have a great opportunity to show them appreciation through all of the stories.

The fifth thing is to incorporate calls-to-action. That original point about identifying your goals for the newsletter - it takes a lot of time and energy to put together a newsletter so don't miss this opportunity to actually ask for your audience to take action. And it can be more so than just donating.

With the Musa article from Rocky Mountain Communities, the call-to-action was a call for volunteers. They were looking for a one-to-one ratio for their program as far as volunteers to students. We did another story on a community garden and they were calling for a donation of plants and seeds and tomato cages and things like that.

Amanda: Thank you for that. On your blog at upandupcreative.com, you wrote an article suggesting that the annual report can also be used as a fundraising tool. How is that?

Jami: Absolutely! Making your annual report a fundraising tool starts with thinking of your annual report as a fundraising tool rather than just a donor thank-you piece, or that report you, quote-on-quote, have to do. When it comes to putting together an annual report, like the newsletter, it takes a lot of time and energy and resources. We encourage all nonprofits to maximize those resources by setting the goal to make the annual report a fundraising tool. And that, ultimately, comes down to two things – your content and the design.

So for content, the two major components starts with highlighting your impact. Yeah, you still need to recognize your donors and include your financials, but don't forget to show the impact that you're making. Show those faces, tell those stories. This will help make an emotional connection to your organization and provide a level of understanding to your viewer that simple numbers and lists just can't deliver. The second thing in regard to content is to remember that it's not all about your organization. It's about your supporters. When it comes to making it a fundraising tool, it's important to emphasize that all of your great achievements that you're reporting wouldn't be possible without all of the donors and volunteers who are working with you to achieve your mission and that's very motivational for donors to help them understand and see that they are part of making a difference. It's too common or too easy for nonprofits to make the annual report all about them. The other component is design. Basically, you need to make it fun to read.

Amanda: So, can you give me some examples of how you make it fun?

Jami: Absolutely. The first thing is really to focus on making the piece skimmable and scannable, and it really comes down to, again, that if it looks like work to read, nobody is actually going to take the time. They may even have great intentions; they may even really like your organization and want to read it, but if it looks like work, the reality is it's going to be put on a pile on their desk and it's going to get covered up by a pile of things they need to get to later, and they won't. When it comes to designing a piece that's fun to read, engaging to read, we focus on breaking down the content, through the design, into skimmable and scannable content. The idea is that we'll break the content down into bite-size pieces. The concept is that someone will be flipping through it, they'll see something that's interesting and engaging; they'll get little facts and important pieces of information; they'll find it interesting enough and valuable enough that they'll be motivated to go back through and actually read it again.

Some of the things, or tips, or tricks that we do, in our little design bag of tricks, are creating mini infographics. So, creating visual representations of interesting statistics - you might have a percentage that you make the number very large and you include some sort of infographic or illustration with that to draw attention to it. Another thing is large "pull" quotes, quotes from real people that highlight the impact of that story. And then don't forget about engaging photos of real people. When we say this, we don't mean just splatter in as many photos as possible, actually being strategic about it and having a major photo that you highlight or showcase and then including clever photo captions that actually include a mini-story within the story, with that photo. And then, you can't forget about plenty of white space. This is a challenge, or maybe a problem that we see in a lot of annual reports - the concept of maximizing the page. The reality is that your eye needs white space to move around on the page, and if you don't have it, that's part of what mentally says to you that this is difficult to read. So, include plenty of white space and, finally, make sure that the design of that piece is consistently branded with the rest of your organization so it's always tying back and continuing to elevate your brand.

Amanda: Ok! Thank you so much. I think you've given us some helpful tips that all of our nonprofits can learn from.

Jami: Great. Thank you so much for the opportunity.

MAC MACSOVITS, EXECUTIVE DIRECTOR

Rocky Mountain Down Syndrome Association

Amanda: I'm here speaking with Mac Macsovits today, the Executive Director of the Mile High Down Syndrome Association. This is a 30-year old organization in Denver and Mac, why don't you tell us a little bit about the mission of your organization?

Mac: Sure. The mission of the Mile High Down Syndrome Association is to enhance the lives of individuals living with Down syndrome, helping them live more independent and empowered lives and we do this through educational resources, community partners and opportunities that we provide to the families and caregivers of loved ones with Down syndrome.

Amanda: Great. I think one of the things that I've seen with this organization that you're doing really well is staying true to your mission. I know that a lot of the classes being taught at the Colorado Nonprofit Association and other nonprofit groups is about the importance of fundraising that doesn't just chase after the dollars, but is really true to your programs, and so you've done that over the past 29 years. Can you tell me a little bit about that and why that's been important?

Mac: Sure. With an organization like ours, our mission is pretty well defined and pretty laser focused. That's made our job a little easier in that, the manner that we're asking for money, you know, we have some core programs that we're able to solicit funds for from those community foundations, or corporations, or even individuals so those have remained pretty constant throughout the years. People with Down syndrome, once again, need to live or need the opportunities to live more empowered, independent lives. So, when we're writing grants and seeking funding, those core values always come to the surface in the way we approach potential funders. So, going back to our mission and the vision of the organization, which is never far from anything that we do, whether its fundraising or program development, or volunteer needs, those always rise to the top and really drive the work that we do.

Amanda: So how do you feel when a foundation says this is too much of a small area? This doesn't reach the public and you feel like you what do and the education that you provide is really valuable to people beyond those who are familiar with Down syndrome. What would you say about that?

Mac: Yeah, that's a great question and that's something that really, at the end of the day, is incumbent upon us, it's incumbent upon the Mile High Association, me as the executive director, the board of directors, our staff, our volunteers, anybody that's associated with the organization to help break down those walls that that's all we are. It's a lack of knowledge, really. So, we need to help educate the Denver community, the Colorado community, and then as a whole, the national community about truly what Down syndrome is. The chances are that you or a loved one, or your children, or your parents have sat in a pew in a place of worship, been on a bus, been in the grocery store, participated on an athletic team or been in the school with someone with Down syndrome. So, these individuals are living in your community. They're people first. What I mean by that is they deserve the same rights and opportunities to success, and the same resources to be successful in the community as anyone else. Now how does this tie directly back to the community? Because they do work in your community. They pay taxes, they are getting married, getting their drivers licenses, but more than that, from a medical or physical standpoint, there are several things that we know about Down syndrome that tie very closely to, quote on quote, the "common man," if you will. Alzheimer's, Autism, Leukemia – these are things that have a higher rate of incidence within the Down syndrome community. So, if you think about Alzheimer's, there's probably not too many people out there that haven't experienced that, unfortunately, within their direct family, their extended family, that's something that we come into contact with on a daily basis. Autism, there's a higher rate of incidence of Autism with individuals with Down syndrome, so we've got a foot in the door there. So really, we're not just Down syndrome. Our folks that are living with Down syndrome, they're a part of the community socially as far as employment, but they're also a part of the community, the research community, as we're looking to find a solution to some of these other medical issues. Instead of looking for the needle in the haystack, you can start with the 21st chromosome.

Amanda: So, you're saying that the research around Down syndrome can also unlock some of the medical information that we need around Alzheimer's and Autism as well?

Mac: Correct. I'm not an M.D. or Ph.D. But we do know, for certain, that people with Down syndrome are predisposed to certain conditions, like Alzheimer's, Autism, so we also know that the rate of, for example, cancerous, hard tumors is very, very low in individuals with Down syndrome.

But, scientifically, we don't have the answer for that. But, if someone were to take the time and spend the money, and the money were there to investigate these things on a medical, biological field, we may find the answer. So, we do know that there are some connections to this, to Down syndrome, as relates to those three areas. We just have never had the funding to fully explore why this has come to be.

Amanda: That's a really great point. That it is more of a public health issue than some people might think it is. It's a little bit broader reaching than we thought in the past.

Mac: Absolutely.

Amanda: And so, another great thing this organization has going for it, is a tremendous amount of dedicated volunteers. Can you tell me where those people are coming from and why you think they have stayed involved in your organization?

Mac: Yep. They come from everywhere! They are parents of young children, adults with Down syndrome, they are neighbors of people with Down syndrome, they are just dedicated community members. One of the things that I think Denver and Colorado truly has going for it is this real sense of philanthropy, and when I mean philanthropy, I mean giving money, but certainly also the time and energy and I've been very impressed with the community here in Denver and across the state as we work on the western slope and some of the more remote areas, that people are just generally interested in getting involved. They want to see Denver, they want to see Colorado become a better place. So, we have people that just have heard the word, if you will. That would like to get involved and help those that maybe can't help themselves like some others, and once again, a lot of our volunteers are family members. So, we pull from all over. We pull from the places that you think we would, those that Down syndrome is a part of their family, and we also pull from just the general public.

Amanda: So how many do you think, in a year, may come through here as volunteers?

Mac: Probably about 250.

Amanda: That's amazing. So, on that note, what advice would you give to a younger organization, some executive director of a six-month old organization that's looking to recruit volunteers and that really wants to stay true to whatever mission that they've set for themselves, but feel like they just want to go after the money and maybe change their programs a little bit so that they look more attractive to certain donors or foundations?

Mac: I think you said it in your question and its stay true to your mission. Be very aware of "mission creep." If that should happen with a young organization, I think you're kind of "dead in the water" at the beginning. Let the mission and the vision of the organization drive your work. You can go chase the quick buck, but I will guarantee you that will doom you in the end if you're not true to your mission and your vision, because people aren't going to fund an organization that's all over the place. In one year, you are asking for one thing to support mission "A," and then the next year you go back and ask for double the money and your mission looks something completely different than what it was a year before. That doesn't instill confidence in funders, I wouldn't think. So, stay true to your mission and let that drive your funding, but also that informs how you deal with your volunteers as well. People want to be involved because it makes them feel good, let's be honest. At the end of the day, that's why people do what they do – it makes them feel good. And so, as an executive director, I would say stay true to that as well. There's a reason that somebody is going to designate five hours of their time a month or a week, or whatever it may be, to spend time in your organization. There's plenty of other very worthy organizations out there so the competition is high. Not only for dollars, but also for volunteer hours. But, if you can stay true to your mission and vision and make it fun and rewarding for those volunteers, and the funders, you're going to be much better served.

Amanda: Ok. Thanks a lot. I think those are a lot of great answers. You've given us some really good information.

Mac: Thank you.

MARCI WHITMAN, OWNER BOOMERANG MARKETING

www.boomerangzone.com

Amanda: Welcome. I'm here this morning talking with Marci Whitman, the owner of Boomerang Marketing. We're going to talk a little bit today about social media and tools for nonprofits. The first question I have for you, Marci, is I think a lot of nonprofit organizations feel like they should be using social media tools to promote their mission and connect with their donors and build up word of mouth about what they're doing. Can you tell me a little bit about the tools you recommend for nonprofits?

Marci: Absolutely. Before I tell you about the tools, I just want to mention that I typically see two things. Organizations will resist social media because they think it's just one more task that they have to put on their already full plate, or that they're really unsure about what information to share. The great thing about social media is that it's a bit more casual, so you don't have to be as concerned about the structure of what you're saying and the contents. The number one tool that I recommend is a Facebook fan page and a fan page gives you the option of customizing your brand so it looks like the rest of your organization's materials. It can be managed by multiple staff members so maybe you have a counselor and the executive director who want to both be posting. It gives you that ability to share the load. You can announce events and one great feature I love is that you can run a fundraising campaign using a free application called "Causes." This application allows your organization to get your fans to rally around your organization and to raise some funds. They encourage fans to promote the cause, show you support, and the fan actually recruits additional donors that you might not be reaching otherwise. All of this is through Facebook. It doesn't require another staff member and the donations are usually in smaller increments, so many ten, twenty-five or fifty dollars, but when you go back and you consider that you don't need a staff that's actually overseeing this fundraising campaign, it really has great value to the organization.

Amanda: So, Marci, they can make donations directly through Facebook?

Marci: They can use the Causes application. So, what you would do is go onto Causes on Facebook. It's a free application that you download. There is a small application that you'll go through to prove that you're a nonprofit organization to Causes and the application takes care of everything for you. It has a little barometer to show how you're doing in raising your goal, how much has been raised, how many recruits you've received - it's a fabulous tool and it doesn't really cost the organization anything to set up.

Amanda: Ok. That's great. I didn't know that you could give through Facebook. So, can you tell me a little bit about an organization that you think is using this tool really well?

Marci: Yes. Challenge America is an organization that has really recently launched a campaign around Memorial Day, actually, so it's a fairly new campaign but they have definitely been seeing donations and the recruits coming in, and what their plan is is to change their particular fundraising campaign on a regular basis around those holidays relative to their organization.

Amanda: Ok. Can you tell me a little bit about Twitter?

Marci: Yes. Twitter is another great tool for organizations to use and I think some of the resistance there is it's just another tool. What I encourage organizations and businesses to use is a free tool called, "Hootsuite.com," and that will allow you to program your Facebook and your Twitter accounts. All you have to do is go into Hootsuite, you can do one post and it will automatically hit to both of the platforms. So, it's not another tool – you can do it all at once. I find that organizations see different donor bases on Twitter versus on Facebook so you're hitting two different markets.

Amanda: And then what about YouTube? Is that useful for nonprofits?

Marci: Oh, definitely. YouTube is a great way that you can showcase different videos on maybe highlighting an event that you recently had. I see a lot of organizations use it for workshops. Maybe you have a workshop on home mortgages, foreclosure, and something you want to highlight and showcase. You can record a short little tid-bit on that and put that up. Another one that I've seen really well was Seniors Resources. They highlight a volunteer each month and they put it up on YouTube. What happens is that volunteer is excited to be recorded and highlighted so they send people over to the YouTube account. So now have more traffic going there, a little bit more exposure to your organization and you get a little extra mileage out of it using it on YouTube.

Amanda: I heard that if you have videos on your website or links to videos, links to YouTube, it actually helps the search engines pick up your site faster. So that may be another reason to get it going.

Marci: It is. It's another reason. It will help you to improve your search engine ranking. The key here is when you post your YouTube video; it's going to ask you for "tags," - "T," "A," "G," "S." You'll want to make sure that you include some key words about the video, your organization name, what you do, who you support, that's really important to improve the rankings.

Amanda: Ok. Well I know I learn by looking at what other people are doing, so are there any other groups that you think I should go to their Facebook Causes page or something like that where I can really get a good visual example of who's doing this right?

Marci: Yeah. I think a great organization here locally is The Gathering Place. I really like the way that they share facts about their organization. Just a quick example is on Tuesday for The Gathering Place, it's "Trivia Tuesday" on their fan page. It's a real fun thing. Just last week, they had a post asking their fans to guess how many kids would visit their organization this summer and receive some support and fans would post how many times, how many people they'd see and then the next day, the organization had a staff member who had recorded just a short two minute video giving the answer to that Trivia Tuesday question. It just was able to show a face to the organization and a great way of sharing some information as opposed to just standard text.

Amanda: Right. It's kind of fun and interactive.

Marci: It is fun and interactive. I think they're a great example of how to they use interaction, how they share information, they use videos really well. I think they're a great example for that.

Amanda: So, what do you think is the most common mistake nonprofits make when they're trying to use sites like Facebook or other social networking sites?

Marci: Hands down, I would say it's in the way that they set up the account. Relatively easy to implement, however I find that on Facebook, organizations create a personal profile page, which is really ideal for you and I to communicate with our friends and family, but not how you should communicate with your fans. That's why Facebook has fan pages. Just making sure that organizations create a fan page. That's what I see is the mistake most frequently.

Amanda: Ok, so make that distinction between a fan page and a personal page.

Marci: Yes.

Amanda: Ok. So finally, can you tell me a little bit about what you can offer to nonprofit leaders who want to learn more about this process and maybe connect with some other organizations that are going through the same thing?

Marci: Yeah. I feel so strongly that Facebook, and Twitter, YouTube, are the tools of the upcoming future here and really important for nonprofit organizations to really rap around. One of the things that we have to offer is a webinar that does focus heavily on hand-holding and helping an organization get onto Facebook, get onto Twitter, and walking you through exactly how to create a fan page account, how to do your post and what to talk about, creating custom landing pages to really own that brand on the account. And when you're struggling, I want to be that resource to help you when you're kind of stuck on, "how do I get interaction going?" "I have posts going, but nobody's talking, how do I get them to post a comment?" And just being able to help an organization do that and brainstorm a little bit is a high priority for me.

Amanda: Right, and probably to keep it going, because I think all of us know this is important and we want to start it, but if you don't see immediate results, it's tempting to just drop it.

Marci: It is very tempting to just drop it!

Amanda: You might need someone to help you keep it alive and fresh.

Marci: Yeah, and that goes back to when you were asking about mistakes I see and one of those is that they create the account and then abandon it. It does mean that you have to promote it, so you have to include the Facebook and the Twitter icons on your website. You have to include it in your marketing materials, in your invitations and really make sure that you're announcing that you're out there on social media.

Amanda: Is there anything else you would like to share with us?

Marci: I'd like to just share a few ideas for posts for organizations who are getting started on Facebook. An idea is to mix some facts and figures. We talked about that with The Gathering Place. Have a fun trivia day, that's an option. Showcase your sponsors! So, give them a little extra mileage out of their sponsorship levels around events. You can highlight them and share a logo. Featuring a volunteer for the month, that's another great way. If you offer classes or workshops, including a video, and getting your fans involved with an upcoming event. Maybe you have a gala coming up and have them vote on the event theme. Give them three ideas and have them vote on that. Maybe you have color schemes that you want them to vote on. Just get them involved and excited. And then lastly, we all have those wish lists for the organization and then occasionally put out that you're in need of coats in the winter time, or, you know, food around Thanksgiving, and just think about those different types of posts. They don't have to be specific to what you're doing right now.

Amanda: Great. I think those are all really good ideas because I know, as a fundraiser, it's so important to get people's input, what kind of events they want to come to, it's going to make it more successful for you.

Marci: Absolutely. Absolutely.

Amanda: Alright, thank you for your time.

Marci: Great, thank you.