

December 2, 2020, 11:30am - 1:00pm

via [Zoom Meeting](https://us02web.zoom.us/w/83710335154?tk=oWAGL7qOdXF8LDWMWxrVjpnbL6w3V-GnFYG6PgcJ_sk.DQIAAAATfYZYshZjVjd1U0VLN1RFaTVxemtmNU5odVNRAAAAAAAAAAAAAAAAAAAAAAAAAAAA)

**MINUTES**

**Announcements and Updates**

**President**

Welcome/Introductions

Elections- new officers were elected!

President - Jodi Tanner

VP - Lisa Kron

Secretary - Jenny Lind

Treasurer - Maggie Bonjean

GPA Advisory Board - Heather, Arthur, Darcie and Jennifer Mangieri will be on this board. We formed this board in order to provide better continuity for the newly elected Chapter Board, so we don’t lose institutional knowledge. Rick volunteered to join, so he will be added as well!

**Scholarships:**

Local: We are excited to announce that we gave out four chapter membership scholarships for people of color at small nonprofits!

Our locally funded Michael Wells Memorial conference scholarship for Oregon and SW Washington members will open next year in June.<https://grantprofessionalsfoundation.org/conference-scholarships/>

National: The Grant Professionals Foundation offers three types of scholarships.

* + Conference scholarships are accepted from June 1st-30th.
	+ Grant Professionals GPC Exam are accepted May 15-June 30th
	+ Membership Scholarships - offered two times per year in the Spring and Fall (dates TBD)
	+ See here for more info:<http://grantprofessionalsfoundation.org/available-scholarships/>

**VP/Membership**

We are now at 49 members.

**Treasurer**

Our balance as of October 31st is $5,785.48. No significant expenses over the last 3 months.

**Program: Highlights from the Annual (Inter)National Grant Professionals Association Conference**

Presenters will share slides with Darcie so the info can be added to our website. Slides will be located here: https://www.gpanorthwest.org/join.html.

* Marginalized Communities Need Data Too - Susy Lacer

Issues Facing Marginalized Communities:

Trust - must use an equity lens to consider the feelings of those you are seeking to connect with. Would this organization consider me an ally? What might make them hesitate? Make sure you have informed consent about the use of any information you’re collecting.

Access and Outreach - common barriers include transportation, safety, privacy, child care needs.

Better practices for sourcing data: Appreciative inquiry method, participatory methods

Creating a case for Funding - draw attention to the gap, demonstrate need, propose an intervention.

Dos and Don’ts for sharing data

* The Role of Grants in Capital Campaigns - Susy Lacer

Gift Pyramid - Lead donors on top, general donors on bottom.

During quiet phase, identify funders that are most passionate about the programs, strategize best approach.

Make sure to involve grant professional in all aspects of campaign planning so they are up to speed on the project and can be most effective at raising funds.

Timing - grant professionals can be helpful for keeping the timeline on track since this is what we often do. May also need to consider how grant reporting fits into the timing of a capital campaign project.

Jenny Lind asked if government grants were discussed as part of a capital campaign and Susy confirmed that they were.

Lucy asked about data reporting, and commented that funders often want different info than the community feels is useful/impactful. Susy said it’s best to let community members be in charge as much as possible and let them lead the way with what information is most meaningful to them.

* Using Data to Strengthen Your Proposals - Emmanuelle Jarmon
1. Building the case for need - use data to establish conditions and document need. Show that something in the community is “bad.” Tell the story. Understand the base need: total population, service area, basic demographics, community disparities. Use internal data to be more specific (vs. census data). Use statistics and compare when possible.
2. Finding external data - Census, ACS info sheet, census academy (for webinars and tips and tricks), Bureau of Labor statistics, State dept of health, state dept of educational data center, media, journal articles, white papers, community foundations, united way.
3. Using data in actual proposals: online forms (consider character limits, upload tables in attachments, mention one important statistic). In federal proposals, use tables and charts to make information less overwhelming. Narrate the data in the text, balance numbers with stories, always follow RFP guidelines. Cite your sources!
4. Using data to set baselines - to show improvement due to intervention. Use evidence-based model to show proven method.
* Evaluation Planning - Emmanuelle Jarmon

Evaluation planning saves money, builders consistency, ensures measurability.

What to address in the plan: what will be measured, how will evidence be gathered and measured, how will data be used?

Steps: logic model, develop evaluation questions (5-7), develop goals, objectives and measures.

Work plans vs. Evaluation plans: work plans are typically used by program and grant managers to clarify implementation of the program and connect it to the design. Evaluation plans are based off of the work plan in order to learn about the work’s impact and see if it leads to the desired outcomes.

* Marketing your grant consulting business - Emmanuelle Jarmon

Build awareness, drive traffic, establish trust. Branding, website, e-newsletters, building credentials, where to advertise, board service, guest speaking.

* Securing Grants from Top Tier Foundations - Maggie Bonjean

Top tier funders are the foundations investing large amounts of money in programs and services across your community. Grant readiness is not enough - it’s the baseline for eligibility. The goal is grant refinement in order to be competitive.

Readiness vs. refinement: readiness is when internal and external stakeholders are informed about the grants process. Understand they have a role to play. Refinement is when stakeholders are prepared to execute the various responsibilities of the grant process.

Getting to refinement involves:

1. Education (are your colleagues informed about the grants process and positioned to execute?)
2. Collaboration (are you communicating with the relevant external parties and well aligned with them?)
3. Application (is your nonprofit positioned to respond to funders’ questions and unasked expectations?)

 Applying this paradigm to grant components:

1. Need - readiness is having baseline data, understanding of the external environment. Refinement is knowing what is the urgency of the problem you are trying to solve.
2. Program design - readiness is significant initiative, staffing, budget. Refinement is knowing how your project design solves the problem, what is unique, and how your priorities are reflected/made clear in the budget.
3. Presence - readiness is showing organization history, evaluations systems in place, proven outcomes. Refinement is showing what gives your org credibility on these issues? How you are engaging with your peers, and what kind of impression you’re creating.
* Creating a Winning Annual Grants Strategy - Kathy Chennault

A grants strategy pulls together all your systems and processes for grants. Also helps maintain institutional knowledge for the org. Master Grants Planner - tool for creating, managing and executing an annual grants strategy.

Gather all your data - logins, common data (EIN, Year Founded, Mission statement, etc), deadlines, funders, funder needs and goals, budgets.

Grants prospect probability rating tool - simple tool to evaluate whether a grant/funder is a good fit. The probability rating can be recorded in the grants strategy spreadsheet to determine next steps/moves management. Useful when org leadership is curious about why some funders have not been solicited.

Program Budgets - ask program staff when is the best time to gather this info.

Award tracking - which were funded, which were denied, quickly see what follow up needs to be done.

Reports - what is the frequency, what needs to be included, etc.

Annual goals - listed by program and also general operating. Show funding goals vs. costs and track progress toward the goal.

Grants Strategy Evaluation Rubric - tool for evaluating the effectiveness of your strategy to see if you are staying on track.

Kathy suggests adding pivot tables to the spreadsheet to make it even more streamlined and functional.

* A Must Do--Be a Grant Reviewer - Jenni Green

Being a grant reviewer improves your own grant applications, providing insight, an insider view and networking opportunities.

Some minimum requirements: Bachelor’s degree, internet access, Acrobat Reader and/or Word, printer, adequate time to do the work, ability to evaluate and apply criteria, etc.

Sites to sign up - All US Department websites, [www.reviewerregistry.net](http://www.reviewerregistry.net)

Process typically involves 2-3 reviewers for each grant, conference call with reviewers and the Chair, potential for comments to be returned for more clarity.

Upcoming 2021 Chapter Meeting Dates

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| **Chapter Meetings** ***11:30 am - 1:30 pm*** | **Executive Committee Mtgs*****3:30 – 5:00 pm*** |
| **February 17th** | **January 15th** |