Goldseker Foundation
Non-Profit Management Assistance Grants

2017 GUIDELINES

Management Assistance Grants support specific, well-defined organizational development initiatives of non-profit organizations. These grants principally fund the engagement of qualified consulting expertise to conduct the following:

> Strategic Planning
> Fund Development & Sustainability
> Financial Management Systems Improvement
> Program Evaluation
> IT Assessment & Planning (not hardware or software purchases)
> Board Development, Executive Coaching, & Succession Planning
> Improving Systems of Service Delivery
> Mergers, Strategic Alliances, and Partnerships

Eligibility

Non-profit 501(c)3 organizations that carry out their work principally in metropolitan Baltimore, primarily Baltimore City, are eligible to apply.

Preference will be given to those organizations whose programs fit within the Foundation's interests in community development and education, but applications will be considered from any organization that does not conflict with our grant making policies. More information about the Foundation's areas of interest and policies can be found at www.goldsekerfoundation.org.

Management assistance grants are intended to help smaller, well-established nonprofits make investments in timely organizational development activities that would not otherwise be possible because of limited budget resources. Most management assistance grant recipients have operating budgets of less than $2 million.

Management Assistance Grants are not intended to be a form of start-up support for new nonprofits. Organizations need to be able to demonstrate program outcomes already achieved and have completed at least two full budget years.

Organizations must call the Foundation's Program Officer, Laurie Latuda Kinkel, to review the proposal concept before submitting an application. Applications that arrive without prior approval to submit will not be considered.

Timeline

Applications are accepted throughout the year. Our board makes funding decisions approximately once per quarter. Foundation staff will advise you of when to expect a decision once your completed application is received.

Application Process

Step 1: Call Laurie Latuda Kinkel at the Foundation, 410-837-5100, to briefly describe your initiative and discuss its general eligibility for grant consideration.

Step 2: If you are invited to apply, form or designate a specific committee of staff and board leaders who will plan and participate in the prospective management assistance initiative. Begin the selection process for engaging the appropriate management consulting expertise. Interview at least two consultants. Applicants should speak with consultants and have a fairly well-defined scope of work for the project before submitting an application.

Step 3: Submit a brief proposal to the Goldseker Foundation containing the following information, in this order:

a) **Cover Letter** (one page only) indicating the category you are applying under and briefly summarizing the outcomes sought by the initiative. Include the contact information, including phone number and email address, for the grant contact on the cover letter. The letter should be signed by both your Executive Director and Board Chair.

In an attached narrative <u>not to exceed five pages</u>, please address the following in this order:

b) **Organizational Context & Readiness**:

Briefly describe the organization's mission and previous organizational development initiatives. How does the organization budget for and invest in organizational development each year? What makes this the right time for this initiative? Describe any complementary activities (e.g., classes taken, books read, or board trainings implemented) that the organization has already undertaken relevant to the project. Describe board and staff commitment and roles. Please be specific about how each has been involved in planning for the initiative and how they will be involved in carrying it out.

c) **Organizational Baseline:**

Describe the current organizational condition(s) you are trying to change or improve. Please be succinct and specific, so your board and staff can later evaluate how the management assistance initiative has helped your organization. Describe steps that the board and staff have already taken to change or improve the condition(s).

d) **Organizational Outcomes:**

What will success in this effort look like? List the specific outcomes you are seeking through this initiative. Because organizational improvement is an ongoing long-term process, please clearly describe the gains you anticipate making in the short-term (one year) *and* those that you are seeking over the longer term.

Describe the connection between the organizational outcomes noted above and the direct impact they will have on how well your organization fulfills its mission or serves its constituency. In other words, how might this initiative translate into increasing the impact of your work?

e) **Initiative Work Plan**:

Briefly describe the *process* you are proposing to undertake. What are the steps you will take to achieve the outcomes described above? Note: Management assistance grants principally support the engagement of qualified outside consulting expertise. Therefore, the work plan for your consultant(s) should be aligned with the outcomes and process you describe in this proposal. Applicants that include a copy of their consultant's scope of work as an attachment will receive higher priority than others because of their readiness to proceed.

g) **Checklist of Attachments** (not included in five page proposal limit):
- ❑ Organization's Mission Statement.
- ❑ Current board list (indicating Officers, Committee Chairs, and the company or organizational affiliation of board members).
- ❑ List of staff and board members on the committee who will plan and manage the proposed management assistance initiative
- ❑ Organizational Budgets for: the current year, last year, and draft budget for the upcoming year, if available. Current and last years' budgets should include actual vs. budgeted revenue and expenses.
- ❑ Most recent audited financial statement.
- ❑ Copy of IRS determination letter of 501(c)3 status
- ❑ Consultant(s) Work Plan & Resume
- ❑ Initiative Budget (see guidelines below)

Step 4: *Proposal Review:* After reviewing your application, Foundation staff will schedule a time to discuss your proposal. Decisions are communicated immediately following board meetings, which occur once per quarter.

Step 5: *Project Evaluation*: Each grantee will be asked to provide an interim report after six months and a final self-evaluation at the end of their initiative. Reporting formats will be provided.

Proposal Review Criteria

Grant funds are limited. Funding decisions will be influenced by whether:

- The proposed initiative has strong staff and board buy-in and participation.
- The proposal clearly identifies organizational baseline conditions and the corresponding organizational change that is sought.
- The proposal is clear and compelling in its description of how the outcomes sought, once achieved, will lead to stronger overall organizational impact.
- The consultant's workplan is clear and aligned with the grant proposal.
- The organization is ready to engage consulting support and proceed with the initiative.

Grant Budget & Match Guidelines

Please keep in mind the following when developing the budget for your initiative:

- All applicants must pledge a cash match.
- Organizations with a budget of $250,000 or greater are must pledge a *cash match* equal to at least 50% of the requested grant amount. Organizations with budgets under $250,000 must pledge a cash match equal to at least 25% of the requested grant amount.
- If the total budget for the initiative exceeds the amount of Goldseker grant funds and organizational match, please indicate other revenue sources and whether they are committed or pending.
- Staff support is integral to the success of any management assistance initiative; therefore, the cost of lead staff to support this initiative should be fully described in your grant budget.

Submittal Instructions:

A hard copy proposal may be submitted to the Foundation at any time, after speaking with the Program Officer. Please do not use binders or folders. If emailing your proposal, please combine all documents into one PDF attachment. Please contact Laurie Latuda Kinkel at any time during the proposal development process with any questions you may have.

Send proposals to the attention of:

Laurie Latuda Kinkel
Management Assistance Grants Application
Goldseker Foundation
1040 Park Avenue, Ste. 310
Baltimore, MD 21201
laurie@goldsekerfoundation.org