Allegany Franciscan Ministries

A member of Trinity Health

FY20 Major Grant
General Operating Support

Application & Evaluation Webinar

October 31, 2019
Housekeeping Reminders

- All lines muted during presentation
- Use Q & A box (not Chat box) to submit questions
  - “Raise Hand” feature if time permits
- Webinar Recording & Slides
Today’s Agenda

- Welcome & Introductions
- The Application
- Evaluation – our philosophy
- Goals & Strategies
  - Examples
- Q & A
Learning Goals

• Understand Allegany Franciscan Ministries’ mission, values and the Major Grant focus area

• Understand the application process, expectations and evaluation philosophy

• Prepare and submit a successful Major Grant Application for General Operating Support

• Understand how to identify organizational goals and strategies and measure progress
Presenters

• Daniel Gibson, *Regional Vice President – Miami-Dade*

• Upendo Shabazz, *Regional Vice President – Palm Beach*

• Cheri Wright-Jones, *Regional Vice President – Tampa Bay*

  • Carla Batts, *Community Investment Specialist*

  • Dr. Shelley Robertson, *Evaluation Consultant*
Our Team

Cheri Wright-Jones; Carla Batts; Kathie Hardy; Erin Baird; Lise Landry Alives; Eileen Coogan; Daniel Gibson; Brittney Frazier; Upendo Shabazz
Opening Reflection

We ask you, Creator and Source of All Being, to be with us this day. Help us to remain committed to the ideals to which you have called us. Please inspire each of us, individual members of this community, to contribute our wisdom and compassion to the betterment of those we serve.
History & Mission

We, Allegany Franciscan Ministries and Trinity Health, serve together in the spirit of the Gospel as a compassionate and transforming healing presence within our communities. Allegany Franciscan Ministries is guided by this mission and rooted in the tradition and vision of the Franciscan Sisters of Allegany.
Core Values

- Reverence
- Stewardship
- Integrity
- Commitment to those who are poor
- Justice
## Major Grant Timeline

<table>
<thead>
<tr>
<th>Event</th>
<th>Timeline</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Letter of Intent (LOI) Due</strong></td>
<td>September 13, 2019</td>
<td>Online application must be submitted by 12 pm (noon).</td>
</tr>
<tr>
<td><strong>Notification of decision; decline or invite to submit full application</strong></td>
<td>By October 18, 2019</td>
<td>Email notification (decline). Email notification, followed by a letter (invite). May be earlier, as decisions are made.</td>
</tr>
<tr>
<td><strong>Full Application Technical Assistance Webinar</strong></td>
<td>October 31 @ 9:30 am</td>
<td>For those invited to submit a full application for General Operating Support.</td>
</tr>
<tr>
<td><strong>Deadline to submit full application</strong></td>
<td><strong>November 21, 2019</strong></td>
<td><strong>Online application must be submitted by 12 pm (noon).</strong></td>
</tr>
<tr>
<td><strong>Site Visits</strong></td>
<td>February 17 – 28, 2020</td>
<td>Allegany staff and Grants Committee members will visit or meet with applicants.</td>
</tr>
<tr>
<td><strong>Decisions Announced</strong></td>
<td>By April 10, 2020</td>
<td>Allegany will work with partners to finalize budgets &amp; outcomes.</td>
</tr>
<tr>
<td><strong>Grant Period Begins</strong></td>
<td>April – September 2020</td>
<td>Flexible depending on each organization’s needs.</td>
</tr>
</tbody>
</table>
Major Grant Focus

To improve the overall health status of underserved communities.

General Operating Support grants will support the organization’s overall mission and goals rather than specific projects or programs, and should help strengthen the organization or further its charitable purposes aligning with Allegany Franciscan Ministries’ mission.

Support is unrestricted and can be used to:

- Underwrite an organization’s administrative or infrastructure costs
- Help maintain core programs and essential staff
Application should demonstrate how the organization:

• Aligns with Allegany Franciscan Ministries’ Mission & Focus;

• Addresses documented unmet needs in community;

• Effectively utilizes community and neighborhood assets and resources;

• Involves those being served;

• Produces impact and measurable results;

• Promotes the dignity of the person.
Tips for Completing the Online Application

• Read through the application instructions!

• Copy/paste into Word® document.

• Limit use of acronyms and avoid jargon.

• Pay attention to character limits (includes spaces).

• Avoid using back arrow.

• Save your work frequently by clicking the “Save Application” button.

• Before submitting, click the “Application Packet” button to download/print.

• Be sure to click the “Submit Application” button once the application is complete.
The Application – Getting Started

Be sure to read through the FY20 Major Grant Application Instructions document!

STEPS:

Go to our web site, www.afmfl.org.

From the “Login” menu, select “Applicant/Grant Partner Login”.

Enter email and password to log on to the application system.

Confirm or edit all contact information (use the pencil icon).

Under “LOI” you will see “Application”.

Click on “Edit Application” link.
How to access the online application www.afmfl.org
Online application process

Logon Page

Email Address

cbatts@afmfl.org

Password

Log On  Create New Account

Forgot your Password?

Welcome to Allegany Franciscan Ministries' online grant management system!

Google Chrome is the preferred internet browser. Click here to install Google Chrome on your desktop.

First time here?

Click "Create New Account". If you need assistance, please view this video tutorial. Be sure to keep this login information for your organization's records.

TIP: This email address is the one we will use to communicate with you if we have questions, which sometimes require immediate response. We suggest using an email address that is available to anyone at your organization who needs to access the application.

Been here before?

If you have already used our new online grant system, but have forgotten your password, please click "Forgot Your Password?" and follow the instructions.

Otherwise, log on using your email address and password.

Not sure?
Online application process
Collaborator Feature

- visible to Applicant who initiated LOI request
- invite other colleagues to work on a single request
- Collaborator can access under “Collaboration Requests” tab on dashboard

**STEP 1 (“Applicant” view)**

**STEP 2 (“Applicant” view)**

**STEP 3 (“Collaborator” view)**
# The Application

## Organization's Purpose
What is the general purpose of your organization? Describe the services your organization provides. What unique role does the organization play in providing these services?

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## Mission Alignment & Focus
How does your organization's mission align with Allegacy Franciscan Ministries' Mission (We, Allegacy Franciscan Ministries and Trinity Health, serve together in the spirit of the Gospel as a compassionate and transforming healing presence within our communities) and Focus (To improve the overall health status of underserved communities)?

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## Dignity of Persons Served
Provide an example of how your organization addresses or ensures the dignity of the clients being served.

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# The Application

## Project Summary
Describe your request for general operating support. What are the main organizational strategies and activities that will be supported with these funds? How will this operating support grant help to advance your mission?

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## Need
What organizational needs will be addressed? How did you assess these needs?

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## Collaborative Partners
Identify your community partners. How do they support your organization? If you are not working with any other organizations or partners please explain why.

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### The Application

**Goals & Strategies**

<table>
<thead>
<tr>
<th>Year 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>From (mm/dd/yyyy):</td>
</tr>
<tr>
<td>To (mm/dd/yyyy):</td>
</tr>
</tbody>
</table>

**Goal #1**
List one of the organization's top three goals.

**Goal #1 Strategies**
List the strategies that have been established to meet Goal #1.

350 characters left of 350

**Goal #2**
List one of the organization's top three goals.

**Goal #2 Strategies**
List the strategies that have been established to meet Goal #2.

350 characters left of 350

**Goal #3**
List one of the organization's top three goals.

**Goal #3 Strategies**
List the strategies that have been established to meet Goal #3.

350 characters left of 350
## Budget Summary Form

**Allegany Franciscan Ministries**  
**FY20 Major Grant General Operating Support Application**

### BUDGET SUMMARY FORM - YEAR 1

<table>
<thead>
<tr>
<th>Budget Category/Line Item</th>
<th>Organizational Budget - Total</th>
<th>Allegany Franciscan Ministries Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel (salaries, wages, benefits, payroll taxes etc for all personnel involved in project)</td>
<td>455,864</td>
<td>0</td>
</tr>
<tr>
<td>Equipment (computers, furniture, etc., less than $3,000 per item)</td>
<td>5,200</td>
<td>0</td>
</tr>
<tr>
<td>Supplies</td>
<td>25,000</td>
<td>13,000</td>
</tr>
<tr>
<td>Occupancy (rent, mortgage, utilities, telephone, internet, etc. assigned as project expense)</td>
<td>30,000</td>
<td>25,000</td>
</tr>
<tr>
<td>Local Travel (mileage, tolls, parking for regular local travel)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Training (staff development, conferences, long distance travel)</td>
<td>5,000</td>
<td>0</td>
</tr>
<tr>
<td>Design, Printing &amp; Postage</td>
<td>2,800</td>
<td>0</td>
</tr>
<tr>
<td>Capital (buildings, vehicles, equipment $3,000 or more per item. Not an allowable expense for grant funds.)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Purchased Services (consultants, legal, accounting services, etc.)</td>
<td>12,000</td>
<td>12,000</td>
</tr>
<tr>
<td>Other</td>
<td>32,292</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>584,156</strong></td>
<td><strong>50,000</strong></td>
</tr>
</tbody>
</table>

### BUDGET SUMMARY FORM - YEAR 2

<table>
<thead>
<tr>
<th>Budget Category/Line Item</th>
<th>Organizational Budget - Total</th>
<th>Allegany Franciscan Ministries Grant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personnel (salaries, wages, benefits, payroll taxes etc for all personnel involved in project)</td>
<td>475,000</td>
<td>0</td>
</tr>
<tr>
<td>Equipment (computers, furniture, etc., less than $3,000 per item)</td>
<td>6,000</td>
<td>0</td>
</tr>
<tr>
<td>Supplies</td>
<td>30,000</td>
<td>13,000</td>
</tr>
<tr>
<td>Occupancy (rent, mortgage, utilities, telephone, internet, etc. assigned as project expense)</td>
<td>32,000</td>
<td>25,000</td>
</tr>
<tr>
<td>Local Travel (mileage, tolls, parking for regular local travel)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Training (staff development, conferences, long distance travel)</td>
<td>5,000</td>
<td>0</td>
</tr>
<tr>
<td>Design, Printing &amp; Postage</td>
<td>3,000</td>
<td>0</td>
</tr>
<tr>
<td>Capital (buildings, vehicles, equipment $3,000 or more per item. Not an allowable expense for grant funds.)</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Purchased Services (consultants, legal, accounting services, etc.)</td>
<td>13,000</td>
<td>12,000</td>
</tr>
<tr>
<td>Other</td>
<td>35,000</td>
<td>0</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>611,000</strong></td>
<td><strong>50,000</strong></td>
</tr>
</tbody>
</table>
Budget Narrative

Budget Narrative (Year 1)*
Please describe how you will use the funds from Allegany Franciscan Ministries by providing detail for each line item indicated on the Budget Summary Form. In addition, provide details on the type(s) of revenue your organization receives using the following three categories: Grants, Fundraising, and Other Revenue.

Medical and general supplies- $13,000. Supplemented by State of Florida DOH grant.
Occupancy- Rent, Electricity, Water and Sewer and internet service- $25,000. Supplemented by general revenues.
Purchased services- Yearly Audit and IRS form 990. $12,000. Total cost.

2,733 characters left of 3,000

Budget Narrative (Year 2) - if applicable
Please describe how you will use the funds from Allegany Franciscan Ministries by providing detail for each line item indicated on the Budget Summary Form. In addition, provide details on the type(s) of revenue your organization receives using the following three categories: Grants, Fundraising, and Other Revenue.

Medical and general supplies- $13,000. Supplemented by State of Florida DOH grant.
Occupancy- Rent, Electricity, Water and Sewer and internet service- $25,000. Supplemented by general revenues.
Purchased services- Yearly Audit and IRS form 990. $12,000. Total cost.

3,233 characters left of 3,500
Audit Requirement

- For requests $50,000 ↑ ONLY
  - MUST submit on application

- Annual, independent audit for most recent fiscal year

- “Management Letter” (findings from auditor provided with final audited financial statement)
  - Material Weaknesses
  - Internal Controls
  - Compliance
  - Deficiencies
Evaluation Philosophy

• As a good steward, Allegany Franciscan Ministries is dedicated to assuring that our investments move us toward our mission.

• Our evaluation process is intended to be clear, simple, and focused on outcomes.

• The evaluation process is respectful of organizations with different size, sophistication, values, beliefs, and traditions.

• It balances qualitative and quantitative methods to inform and guide our decisions while improving services provided by our grant partners.
Impact

• What will change for your organization?

• Reduced staff turnover
• Increased clients served
• Improved outcomes for clients
• Greater efficiency in operations
• Increased staff knowledge and skills
Goals & Strategies

• Using the SMART system
  • Specific
  • Measurable
  • Achievable
  • Relevant
  • Time-oriented

• Use existing goals if applicable; you do not need to create new goals for the grant.
Examples: Goals & Strategies

Goal: Increase the financial sustainability of the organization.
  • Through cultivation, increase major gifts by 5% each year.
  • Provide board education so that 100% of members participate in fundraising strategies by 2022.
  • Identify two new non-grant sources of funding by 2022.

Goal: Increase the number of clients from underserved communities.
  • Develop X new partners who are trusted by residents by 2021.
  • Provide 50% of services within the community at existing sites by 2022.
  • Hire 2 staff from the community or with ties to the community by 2020.
Reporting Expectations

• Provide an update on each overall organizational goal including the results to date.

• Provide an overview of how the work is progressing including any challenges or lessons learned, trends, and projections.

• Report the number of clients served.
Next Steps

- Communicate with your team and discuss possible outcomes together.
- Log in to the grant administration system and begin the application.
- Contact your regional VP with application questions earlier rather than later.
- Complete the Full Application by **November 21, 2019 at 12 pm (noon)**.
Expectations if funded:

• Work with Allegany team members to finalize overall organizational goals and strategies and develop a reporting and payment schedule.

• Update Allegany Franciscan Ministries on staffing changes and organizational updates.

• Proactively reach out to your regional VP and request an extension if you cannot meet a report deadline.
Need help or have questions?

For technical support, contact Carla Batts, Community Investment Specialist at 727-507-9668 or cbatts@afmfl.org

For other questions, contact:
  Daniel Gibson, Regional Vice President – Miami-Dade Region
  305-860-1441 or dgibson@afmfl.org

  Upendo Shabazz, Regional Vice President - Palm Beach Region
  561-802-9013 or ushabazz@afmfl.org

  Cheri Wright-Jones, Regional Vice President - Tampa Bay Region
  813-685-3232 or cwrightjones@afmfl.org
The webinar recording and slides will be posted to our website soon!

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