



**share**tank

**GIVING . GROWING . IRVING**

**Share Tank is a unique opportunity for businesses to collaborate with and support vital nonprofit work in the Irving community. These non-profit services are critical to the economic development of our City and improving the quality of life in our local community.**

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***Share Tank 2019 Welcome***

***Mayor Pro Tem  
Oscar Ward  
City of Irving***

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***Steering Committee Welcome***

***Beth A. Bowman, IOM, CCE***  
*Greater Irving-Las Colinas*  
*Chamber of Commerce*

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# ***Program Overview***

- **Steering Committee**

- **City of Irving** – Mayor Rick Stopfer, Chris Hillman & Susan Rose
  - **Greater Irving-Las Colinas Chamber of Commerce** – Beth Bowman, Erica Mulder, Dexter Freeman & Portia Washington
  - **Irving Convention and Visitors Bureau** – Maura Gast
  - **Irving Arts Center** – Todd Hawkins
  - **Education** – John Plotts (University of Dallas)
  - **Non-Profit** – John Drake & Tom Foley (The Study USA )
  - **Business** – David Russell (Philanthropology, LLC)
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## ***Program Overview***

- **2019 Goals**

- **Goal #1:** To increase the capacity and awareness of newer nonprofit agencies so that they will be more able to obtain funding from businesses, foundations, government entities, etc.
  - **Goal #2:** To reduce duplication of services and provide a structure for coordinated giving
  - **Goal #3:** To showcase philanthropic efforts of our business partners
  - **Goal #4:** To increase financial stewardship on the part of non-profits
  - **Goal #5:** Specifically target 501(c)(3) organizations registered in Irving, TX
    - Have an Irving, TX physical address
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***Grants + Giving = Goals***

***David O. Russell***  
***Philanthropology, LLC***  
***President/CEO***

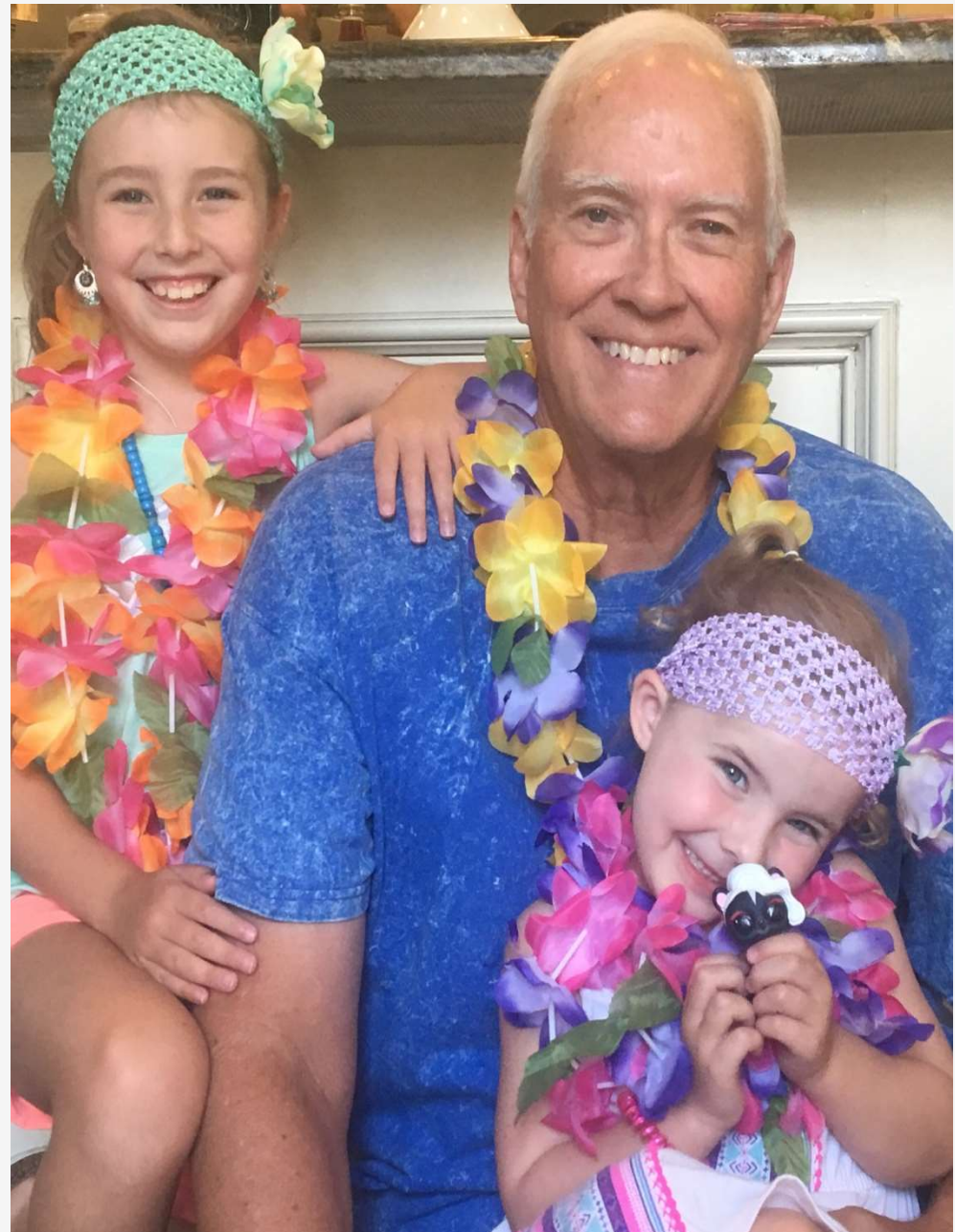


*VP – External  
Affairs for  
Verizon*

*Corporate  
funder for  
over 25 years*

*Based in  
Irving for 28  
years*

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*April Martin*  
*Corporate Affairs*  
*Manager*

Kroger

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*Torrence  
Robinson*

*Senior Director,  
Global Community  
Affairs &  
President, The  
Fluor Foundation*

Fluor



*Kristen  
Worthington  
Public Affairs  
Officer*

Citi

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*Grants + Giving = Goals*

***PREPARATION:***  
Things to consider before  
approaching a corporation  
or foundation for a gift.

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*Grants + Giving = Goals*

***FOLLOW-  
THROUGH:***

How to make a lasting  
impression in your meeting  
and be relevant.

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*Grants + Giving = Goals*

## *FOLLOW-UP:*

Tips for effective follow-up  
after the meeting.

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*Grants + Giving = Goals*

*Q&A*

Your chance to ask the  
panelists questions.

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***Share Tank 2019***  
*15-minute break*

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# GRANTS 101



**Linda Gray, DCL**  
**Certified SCORE Mentor**



# AGENDA

Session 1 - 3 Grant Application Formats

Session 2 - 4 Types of Grant Funding

Session 3 - Grant Researching & Funding Agencies

Session 4 – Components of a Grant Application

Q & A

## Letter of Inquiry

- 1. Introduction – Mission and Purpose**
- 2. Why the funds are needed to address the problem?**
- 3. The amount of funding needed?**
- 4. How are you going to use the funds?**
- 5. How are you going to evaluate and share the success?**

# Form Application

- **A pre-developed form by the funding agency**
- **Can be filled out online through a online generated application with log in requirements**
- **A form that is linked on the website and filled out that can either be submitted online or mailed**
- **Has a requirement for additional attachments if needed**

# Proposals/Narrative 7-35 Pages

- ✓ **Program Proposal - To provide services**
- ✓ **Research Proposal - To research or examine a problem or solve a problem**
- ✓ **Training Proposal - To offer training and educational programs or to receive training**
- ✓ **Technical Improvement Proposal - To build, remodel, renovate buildings and/or acquire equipment.**





# #1 Private Foundations

- Private philanthropists or Family members establish to support educational, charitable, or religious activities
- There are fewer reporting requirements than federal applications and more generous and tend to fund national programs

**(Examples) Bill Gates Foundation and  
Meadows Foundation**



# #2 Corporate Funding Programs

- **Giving programs that generally award cash grants through their parent companies**
- **Sponsorship for special events, project grants, employee matching donations, and non-monetary such as donated products or equipment**
- **(Examples) financial institutions, major Retail Stores, Community based businesses and Corporations**

# Corporate Funding Sources

\$ United Way - <https://unitedwaydallas.org/>

\$ Walmart - <http://giving.walmart.com/>

\$ Michael & Susan Dell (Computers) Foundation - <https://www.msdf.org/apply/>

\$ Home Depot - <https://corporate.homedepot.com/community>

\$ TJ Maxx Foundation - <http://www.tjx.com/responsibility/communities/our-us-foundation.html>

\$



# FEDERAL GRANTS 101

SECURING MILLIONS FOR YOUR  
ORGANIZATION

# #3 National Federal Grants

System Award Management  
Government Agencies -  
<https://www.grants.gov/>

Department of Human Services

Department of Labor

HELP | REGISTER | LOGIN

SEARCH: Grant Opportunities | Enter Keyword... GO

HOME | LEARN GRANTS | SEARCH GRANTS | APPLICANTS | GRANTORS | SYSTEM-TO-SYSTEM | FORMS | CONNECT | SUPPORT

**ALERT from SAM.gov:** For your SAM.gov registration, you must submit a notarized letter appointing the authorized Entity Administrator before your SAM.gov registration will be activated. This requirement applies to both new and existing entities. Read the FAQs to learn more about this process change.

**The Grants.gov Mobile App**  
Quickly access grant search and notification tools through the Grants.gov Mobile App.



# Texas State Federal Funding

- Texas.gov E-Grant Applications

<https://txapps.texas.gov/tolapp/egrants/search.htm>

- Texas Health & Human Services

<https://www.dshs.texas.gov/>

- One Star Foundation - Faith Based Initiative

<http://onestarfoundation.org/>

- Local City and County Federal Funding search  
Vendor Program

- Community Development Block Grant (CDBG)  
Funding search Strategic Plans - City and County

## #4 Individual Fundraising Events

- **Signature Nonprofit Events – GoFundMe (personal)**
- **North Texas Giving Day**
- **Golf Tournaments**
- **Dinners-Banquets**
- **Seminars and Workshops**

# Other Funding Searches

Grant Gopher - <https://grantgopher.com/>

Grant Station - <https://grantstation.com/>

Grant Watch - <https://www.grantwatch.com/>

GrantVine - <http://www.grantvine.net/>

Philanthropy News Digest - <https://philanthropynewsdigest.org/>

Get Ed Funding

<https://www.getedfunding.com/c/index.web?s@O.myCx5DnAES2>

Urban Awareness USA - <http://urbanawarenessusa.org/>

Grant Forward - <https://www.grantforward.com/index>

# All Documents On-Hand

- 1. Qualified Staff with Resumes/Bio**
- 2. Board of Director Listing**
- 3. Operating Budget / Project Budget**
- 4. Copy of IRS Letter of Determination**
- 5. Other documents that may be required**



# Elements of the Proposal

- ✓ **Needs Statement**
- ✓ **Goals & Objectives**
- ✓ **Plan of Operation**
- ✓ **Key Personnel**
- ✓ **Commitment & Capacity**
- ✓ **Evaluation Plan**
- ✓ **Project Budget**

# Needs Statement

- **Builds a case for support by justifying the need for funding**
- **State the facts (not fluff)**
- **Document the need with statistics**
- **State the need or problems to the mission and goals of the organization**
- **Don't start writing about the solution**

# Utilizing Census Data

## Search National, Regional and State Data

- Research Centers, such as Universities
- Population, Income, Education

<https://www.census.gov/>

- Access Local Data
- American Fact Finder
- North Central Texas Council of Governments <https://nctcog.org/>

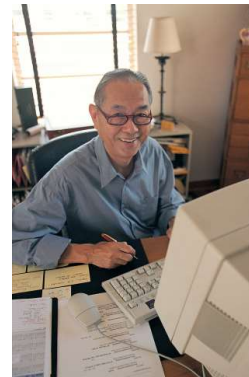


# More Data: Your Target Clients

## Demographics:

What are the characteristics of your Clients?

- Age
- Income
- Marital Status
- Family Stage
- Race/ Ethnicity
- Where are they located?



<https://claritas360.claritas.com/mybestsegments/>

<https://segmentationsolutions.nielsen.com/mybestsegments/>

[Home](#)[ZIP Code Look-up](#)[Segment Explorer](#)[Learn More](#)[Contact Us](#)[Home](#) > [ZIP Code Look-up](#)

## ZIP Code Look-up

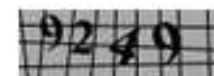
[About ZIP Code Look-up](#)

Nielsen's lifestyle segmentation systems define every household in the U.S. by distinct lifestyle types, called "segments", to provide insights on where and what they are like. Marketers use these insights to create more effective and efficient marketing strategies.

MyBestSegments ZIP Code Look-up lets you view your neighborhood's household segments within any ZIP Code. Typically, a ZIP Code Look-up will allow you to **view your neighborhood's top five segments**, along with a descriptive snapshot about each segment's characteristics for that area. To **enter your 5-digit ZIP Code**.

For more lifestyle and behavioral data details about consumer segments in your market, you can [subscribe to Nielsen MyBestSegments](#). **about ZIP Code Look-up?** Visit [Frequently Asked Questions](#).

Please enter a valid 5 digit zip code

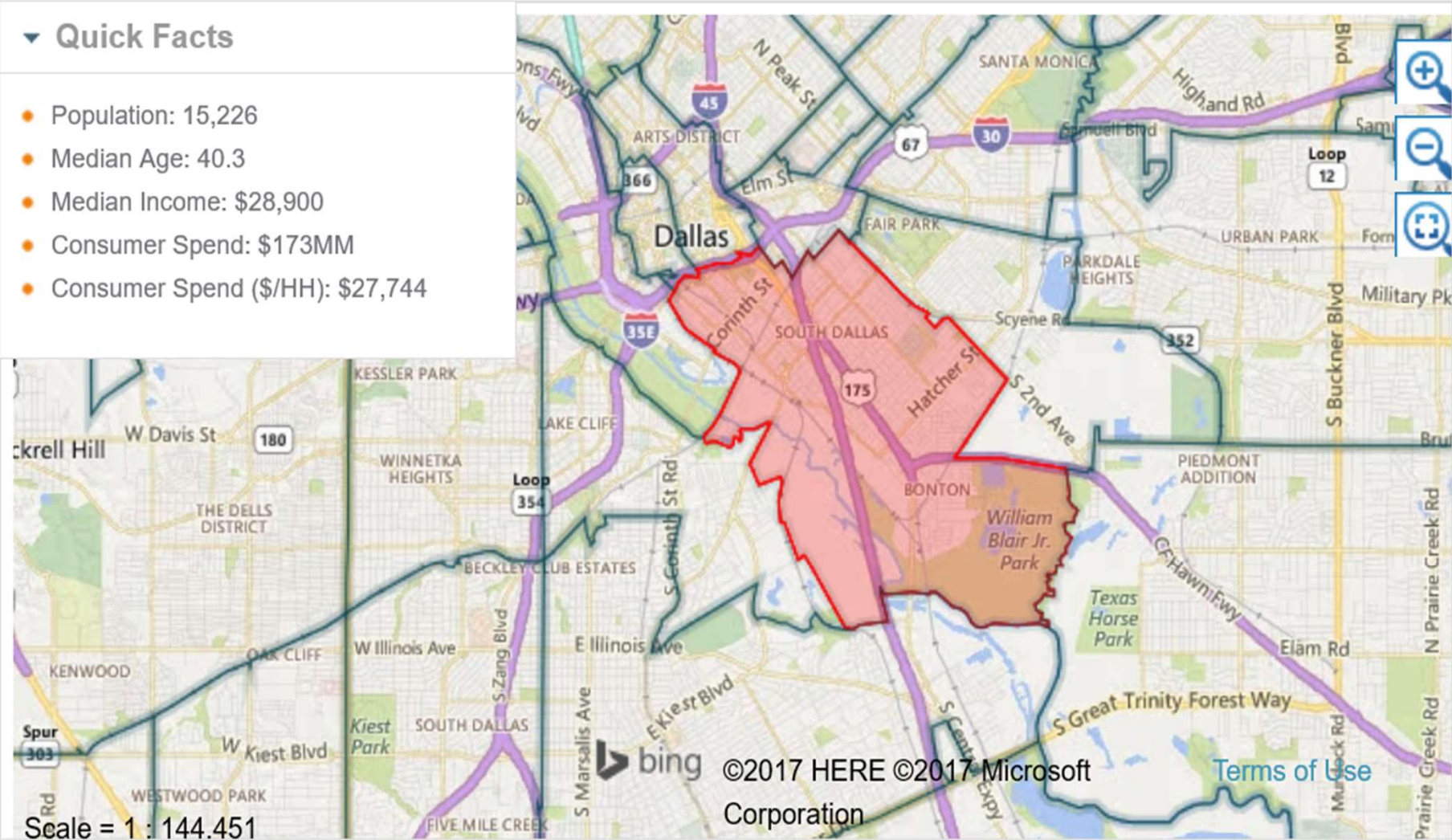
Enter 5 digit zipcode: Enter the security code\* 



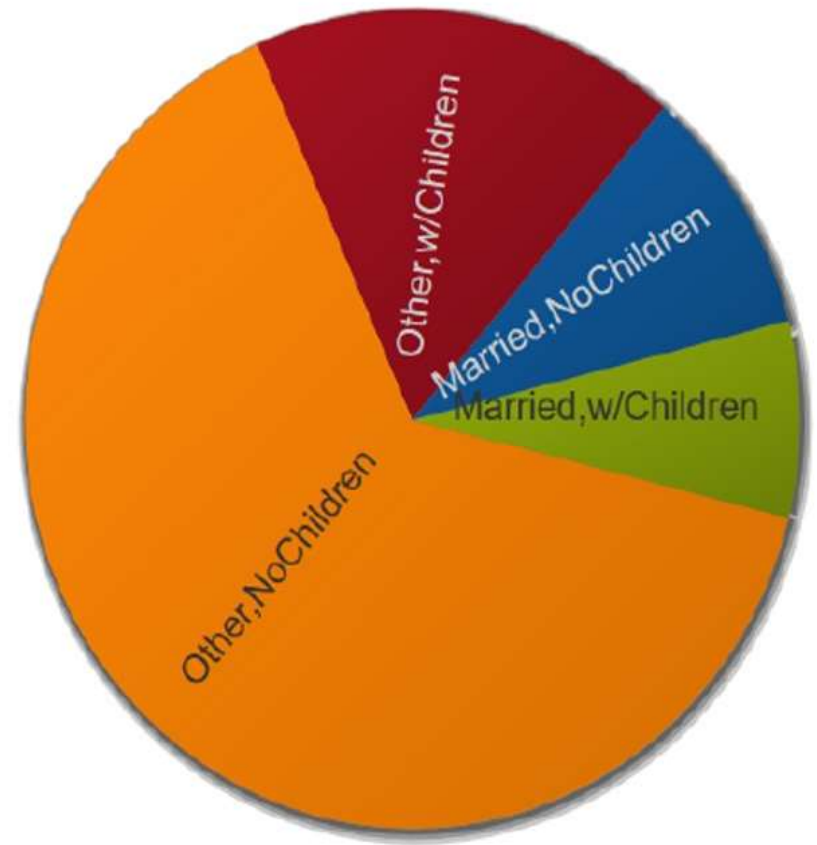
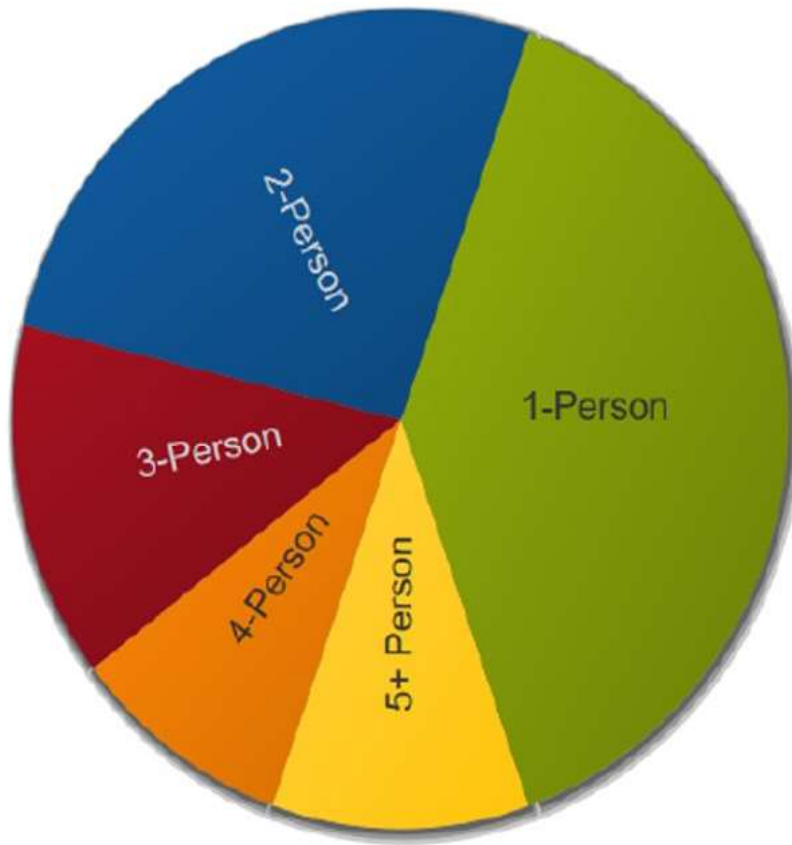
# South Dallas

▼ Quick Facts

- Population: 15,226
- Median Age: 40.3
- Median Income: \$28,900
- Consumer Spend: \$173MM
- Consumer Spend (\$/HH): \$27,744

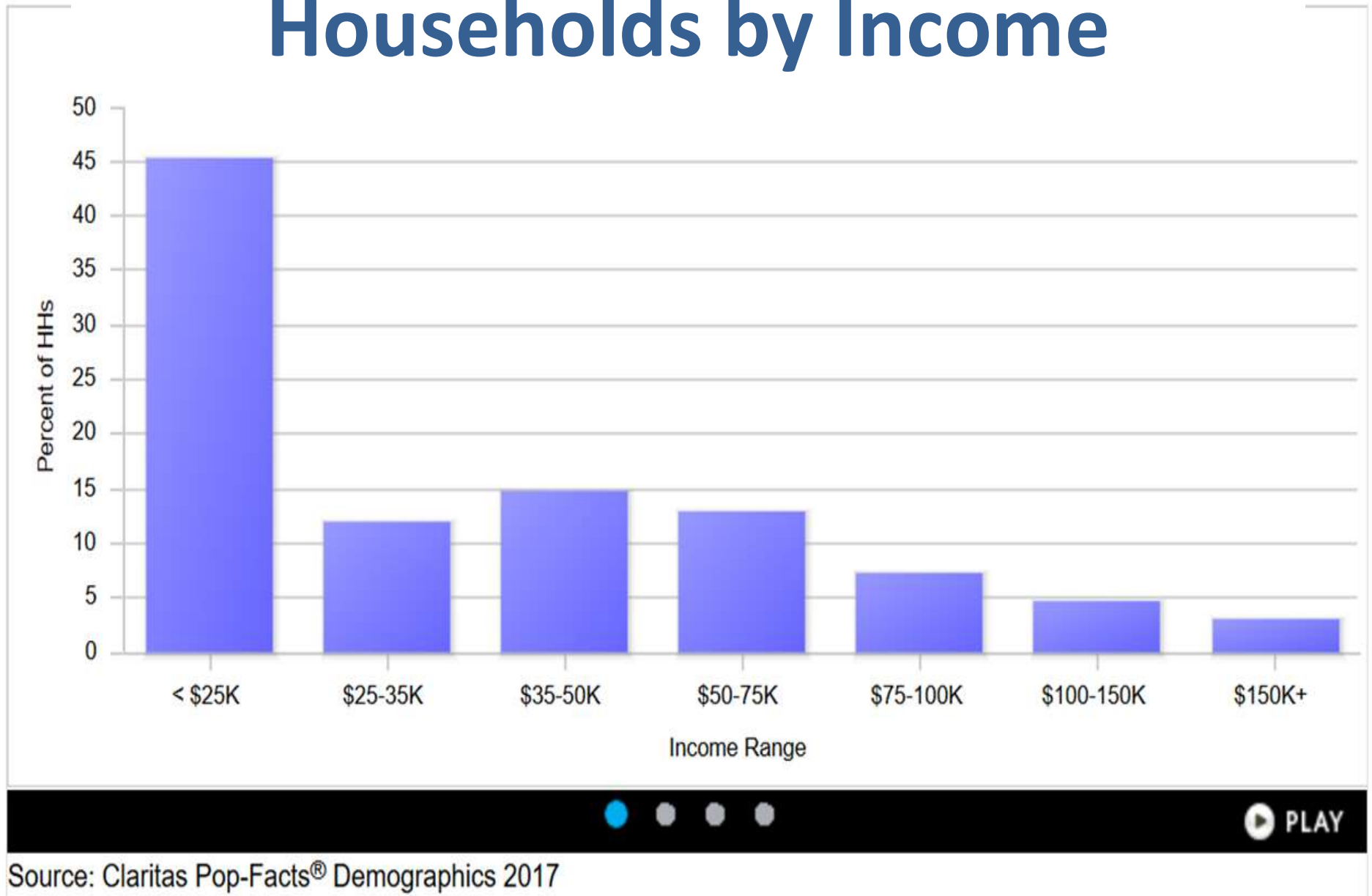


# Household Composition



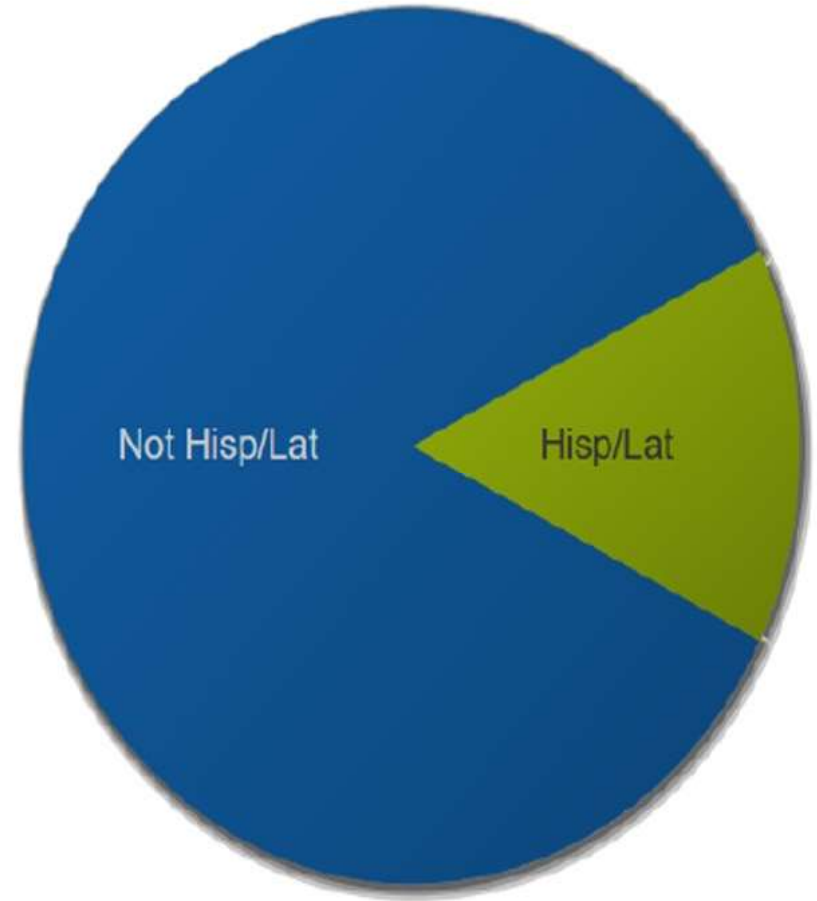
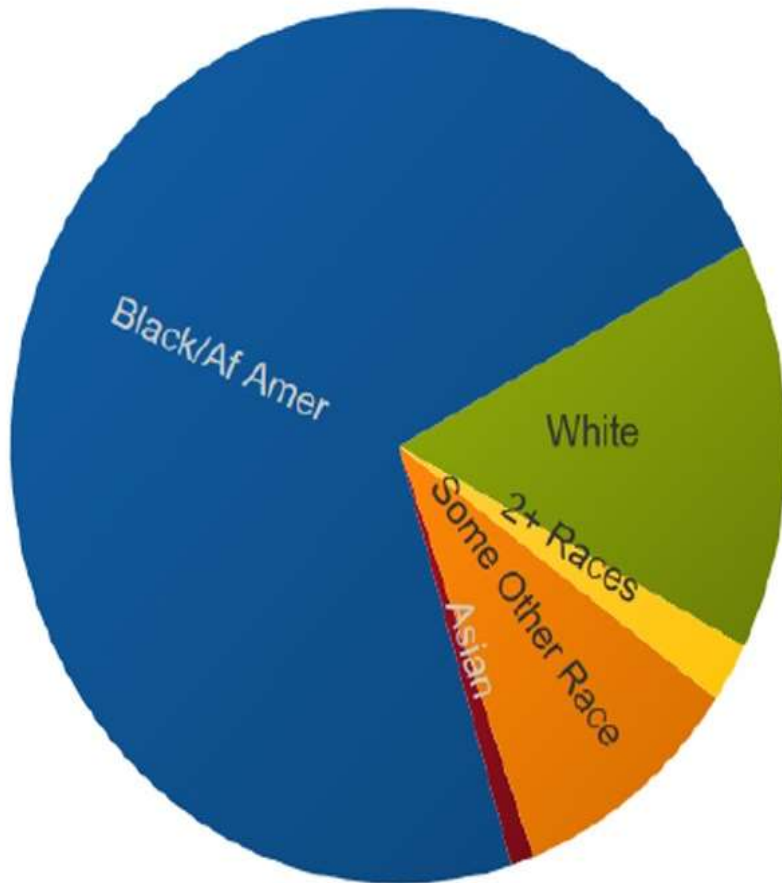
Source: Claritas Pop-Facts® Demographics 2017

# Households by Income



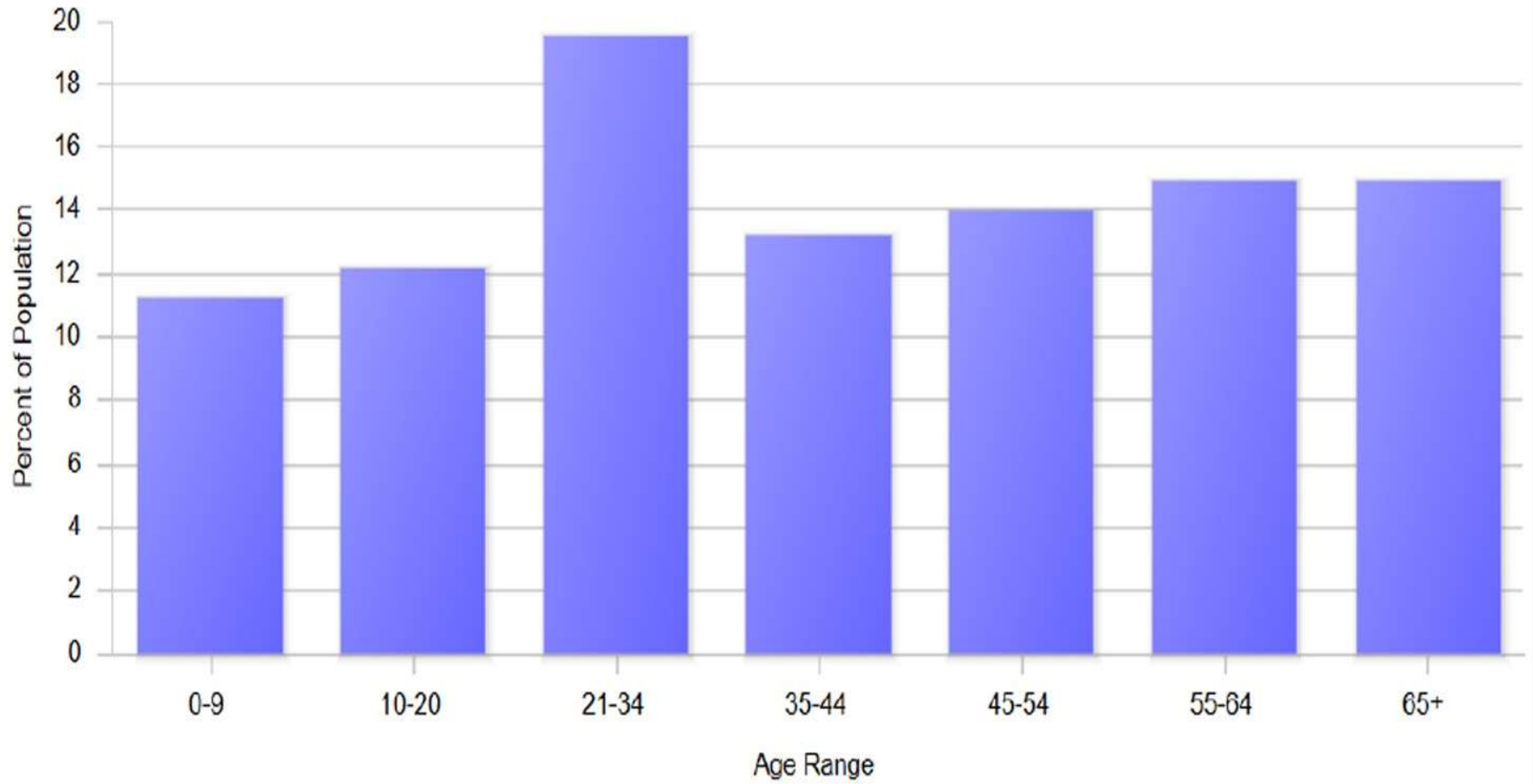


# Population by Race & Ethnicity



Source: Claritas Pop-Facts® Demographics 2017

# Population by Age



Source: Claritas Pop-Facts® Demographics 2017

# Goals & Objectives – Program Services

**Describe the expected outcome or result and state the plan for achieving the Goal.**

## Goals *versus* Objectives

- Goals describe the anticipated outcome.
- Objectives are measurable that relate to the outcome.

# Goals & Objectives Continued...

**GOALS (To Be Accomplish) vs.  
OBJECTIVES (Activities to accomplish the goal)**

- Specific, defined, quantifiable, AND measurable
- Make a change or improve a condition or situation
- Learn from what went right or not so well.

Use S.M.A.R.T. →

**Specific**  
**Measurable**  
**Attainable**  
**Realistic**  
**Time-Bound**

# Plan of Operation

**Plans for implementing the proposed project:**

- 1. How am I going to achieve my objectives?**
- 2. How am I going to recruit Clients?**
- 3. What will be the operating hours?**
- 4. Outcome-based future goals?**
- 5. List measurable, time-bound Objectives**
- 6. Include a timeline for visual tracking of progress**

# Key Personnel/Staff

**Overview of the capability to manage the project:**

- ✓ **List key persons and their roles in the project**
- ✓ **Include a job description of the position**
- ✓ **Use an organizational chart**
- ✓ **Include Resumes**



# Commitment and Capacity

- Provide a list or description of the organization's commitment of resources to the project –
- Board Approval
- In-Kind
- Volunteer – Value of Time  
<https://independentsector.org/>



# Evaluation Plan – Why?

To assure the funding source that you have a plan for measuring and reporting your results



- Identify an Evaluator
- Develop activities and timeframes for evaluating each objective
- State clearly how your evaluation data will be collected and reported



# Evaluate & Monitor Progress

- ✓ **Develop a system for tracking your progress**
- ✓ **Surveys, Enrollment Sheets, Progress Reports, etc. to document your work**
- ✓ **Always try to include a fee for a PhD evaluator in the grant budget request**

# BUDGET

- Personnel
- Fringe Benefits
- Travel
- Space / Rent
- Supplies / Printing / Postage
- Telephone / Internet
- Equipment / Computers / Furniture
- Contractual
- Other



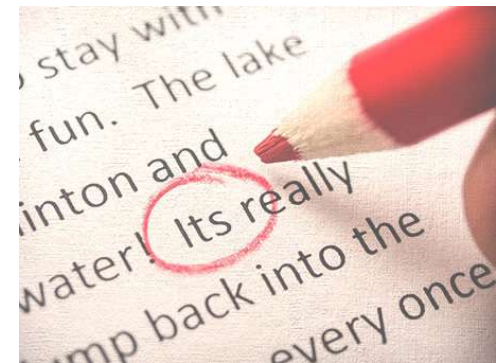
# Program Budget

- \$ Explanation of budget request should be written throughout the proposal for clarification**
- \$ Budget should be reasonable and adequate**
- \$ Always include in Budget to show each line item and explanation**

# Grant Review Process

## Why Did My Application Get Denied?

- ? Not following directions or non-responsive sections
- ? Weak management plan
- ? Objectives are too ambitious/unrealistic



## Grant Review Process (Cont.)

- ? **Budget over the limit and is not described in the implementation plan**
- ? **No program collaboration or coordination within the community**
- ? **Duplication of community services**
- ? **Insufficient evidence of applicants capabilities**

# QUESTIONS?

Thank You!

[Dallas.SCORE.org](http://Dallas.SCORE.org)





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# ***Pitch Day Guidelines***

***Dexter J. Freeman II, MBA, IOM***  
*Greater Irving-Las Colinas*  
*Chamber of Commerce*

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# 2019 Curriculum

- Each half-day sessions will begin at 9 A.M. - noon at The Study USA
  - **Education Day #1 (August 29) (lunch served)**
    - Grants + Giving = Goals
    - Pitch Day guidelines
  - **Education Day #2 (September 26)**
    - Unlocking the Secrets to Securing Sponsorships
    - Pitch Day Q&A
  - **Education Day #3 (October 17)**
    - Beyond the Basics – Memorable Marketing for your Nonprofit
    - Pitch Day Prep Q&A
  - **Education Day #4 (November 21) (lunch served)**
    - Do's and Don'ts – Governance and Law
    - Pitch Day Prep

**Pitch Day,  
December 5**  
The Study USA

**Awards Celebration,  
December 19**  
Irving Arts Center

## Share Tank Guidelines

- For participation in Share Tank Pitch Day, your organization is required to be a registered nonprofit in Irving, Texas and deliver services in Irving, Texas.
  - For participation in Share Tank Pitch Day, your organization must provide a copy of your Form 990 (or 990-N) **on or before Pitch Day Prep on November 21 (Education Day #4)**.
  - All participating nonprofit organizations must complete the registration form on the Share Tank website: [www.irvingsharetank.com](http://www.irvingsharetank.com)
  - Your organization must have a representative present for the duration of each of the four Education Days to qualify for participation in Share Tank Pitch Day.
    - Both staff and board members are eligible to attend sessions.
  - All participating nonprofits grant the Greater Irving-Las Colinas Chamber of Commerce and/or the City of Irving permission to use your likeness photographs, video and/or other digital media in any and all of its publications including web-based publications without payment or other consideration.
-

## Share Tank Guidelines

- If your organization previously received Share Tank funds, you are required to submit a Stewardship Form prior to Share Tank Pitch Day.
  - Organizations will have a total of **7 minutes** to deliver their pitch.
    - There will be a total of **5 minutes** for feedback from panel of Sharers.
  - All participating nonprofit organizations have the option of utilizing computer/projector technology.
  - No funds will be distributed at Pitch Day.
  - Include in your pitch your name, your location and succinctly your background.
  - Be clear about what project you hope to accomplish or specific need you hope to meet with grant funding.
  - Remember that your pitch is meant to inform, engage and market your organization.
- 



## FAQ - *Participants*

- If my nonprofit participates, how much time will it involve and when?
    - The minimum amount of time required to participate will be three (3) hours per Education Day (four total Education Days). See the [website](#) for exact dates. The Pitch Day (December) will take 30 minutes per nonprofit. Therefore, a nonprofit's minimum hourly commitment will be 12.5 hours for the program.
  - How will Share Tank be publicized?
    - Share Tank will primarily be publicized via our [website](#). We will also use the following communication: social media, print and TV (ICTN).
  - What other companies are involved?
    - See our [website](#) for a complete list of partners.
  - Exactly what would be the **obligations** for my nonprofit if we participate?
    - All nonprofits are welcomed to participate in Share Tank.
    - For participation in Share Tank Pitch Day, your organization is required to be a registered nonprofit in Irving. (i.e. with an Irving, Texas mailing address)
    - For participation in Share Tank Pitch Day, at least one representative (staff or Board volunteer) of your nonprofit must be present for the duration of each Education Day.
  - What level executive would be expected to participate? (manager, director, VP, etc.)
    - Nonprofit Executives, Board Members and Staff with oversight responsibilities are expected to participate
-

## FAQ – Program Partners

- What level executive would be expected to participate? (executive officer, manager, director, VP, etc.)
    - Mid to senior executives are expected to participate.
  - When would our donation actually need to be made and to what entity?
    - Your donation will need to be made out to the Irving Community Development Foundation (a 501(c)(3) organization of the Greater Irving-Las Colinas Chamber of Commerce) **on or before December 6, 2019**.
  - Who's on the steering committee for this program?
    - See our [website](#) for a complete list of partners.
  - Are there opportunities to sponsor any portions of the Share Tank program for additional visibility?
    - Certainly! Sponsorship inquiries can be submitted [here](#).
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