

# Nonprofit Toolbox 2018 Guidelines



# Overview

## ABOUT THE COMMUNITY FOUNDATION FOR GREATER ATLANTA

Since 1951, the Community Foundation for Greater Atlanta has been connecting donors, nonprofits and community leaders to strengthen the 23-county Atlanta region through philanthropy. As a top 20 community foundation of approximately 750 nationally, with approximately \$1.1 billion in current assets, Georgia's second largest foundation exists to connect the passions of donors with the purposes nonprofits strive to improve. Through its quality services and innovative leadership on community issues, the Foundation received more than \$144 million from donors in 2017 (unaudited) and distributed more than \$97 million that same year to support nonprofits throughout the region and beyond. For more information, visit: [cfgreateratlanta.org](http://cfgreateratlanta.org) or connect with the Foundation via [Facebook](#) and [Twitter](#).

At the Community Foundation, we believe in the power and potential of individuals and organizations to change communities, whether those communities are physical neighborhoods, a group of individuals with a common interest or a cohort of organizations focused on similar issues. We play a variety of roles, but our key goal is to be the connecting point for the various partners, nonprofit organizations and community leaders working together toward the common vision of stronger greater Atlanta region.

## IMPACT AREAS

The Community Foundation for Greater Atlanta fulfills the passions of our donors by investing in our region through grantmaking, partnerships and advocacy. To create meaningful, lasting change, our efforts align via measurable objectives through focused "Impact Areas." We practice what we preach – evolving beyond grantmaking strategies and industry jargon to real, tangible impact.

**These five impact areas are our promise to the 23-county region - that in partnership with our donors, nonprofits and collaborators, we vow to make Atlanta a better place for all residents to live and thrive.**



**Arts**



**Community Development**



**Education**



**Nonprofit Effectiveness**



**Well-being**

**Arts** >> Build a dynamic arts ecology to ensure all residents in our region will have access to high-quality cultural experiences and diverse artistic programs

**Community Development** >> Advocate for equitable economic growth, strong civic health and safe, sustainable communities

**Education** >> Improve outcomes and expand opportunities for all learners across the education spectrum

**Nonprofit Effectiveness** >> Invest in the region's nonprofits with management and financial resources to equip these organizations to effectively manage operations and high-performing programs

**Well-being** >> Ensure a healthy, safe and engaged region, where residents have access to quality health care and nutritious food

All of these impact areas are complex and multi-dimensional and require cross sector, regional collaboration: these are opportunities with solutions that cannot be achieved by any one entity. The Foundation has an extensive base of knowledge and relationships across the region, spanning diverse communities, populations and issues, making us uniquely poised to serve as a hub for impact.

# Overview

## ABOUT NONPROFIT EFFECTIVENESS

The Community Foundation's commitment to strengthening and supporting our region's nonprofits includes more than giving financial grants. Effective organizations exhibit strengths across five areas: clear mission and purpose; volunteer and staff leadership; decision-making and strategy; strong financial, governance and program development practices and policies; and the ability to advocate for themselves and their clients.

## WHAT IS THE NONPROFIT TOOLBOX?

The Nonprofit Toolbox is a program of the Community Foundation for Greater Atlanta that provides nonprofit organizations with tools to strengthen their management, governance and operations. Most Nonprofit Toolbox awards are not financial grants; they are custom-designed management consulting packages to help solve a key organizational challenge or problem. Organizations selected to receive a Nonprofit Toolbox award will work with a specialist who will construct a package of appropriate organizational assistance. The specialist will oversee the award and delivery of professional services to ensure the organization's stated outcome is reached within the designated time frame. The goal of the Nonprofit Toolbox program is to provide packages of services and tools to help nonprofit organizations become financially stronger and organizationally strong.

In addition to management consulting packages, nonprofits can apply for grants to build organizational capacity through technology. These grants can be in the form of consulting services and/or cash grants.

## HOW ARE APPLICANTS PRIORITIZED?

Nonprofit Toolbox awards are designed to assist in management, governance and administration issues, not programmatic issues. The Nonprofit Toolbox will give priority to organizations that:

- ◆ Exhibit organization-wide planning and decision-making in requesting support
- ◆ Show clarity in mission and vision
- ◆ Clearly define organizational challenges and goals
- ◆ Demonstrate a readiness to embark on the solutions to issues and/or challenges
- ◆ Align with the Foundation's [Impact Area](#) metrics
- ◆ Are requesting support for strategic planning for the first time or are developing their first strategic plan
- ◆ Have a strategic plan in place before requesting board development, human resource, marketing, resource development or succession planning assistance
- ◆ Demonstrate an understanding of how strategy can propel the organization
- ◆ Are located and providing services outside of Fulton, Cobb, DeKalb and Gwinnett counties (Note: All applicants must be located and providing services within the Foundation's [23 county service area](#))

*Be sure to review page 6 of the guidelines for complete eligibility criteria.*

## TYPES OF PROJECTS THAT THE NONPROFIT TOOLBOX FOCUSES ON

The Foundation provides the following types of Nonprofit Toolbox grants: Organizational Assessments, Technology Assessments and Implementation Awards, and Operational Capacity grants:

### Organizational Assessment

Sometimes, organizations have a hard time identifying their highest priority challenge. Staff and board might agree on the need to develop a strategic plan and to strengthen the board of directors, but which challenge should be tackled first? An organizational assessment is very helpful in times like these. The assessment may involve working with a staff member from the [Georgia Center for Nonprofits'](#) Nonprofit Consulting Group or another outside consultant who will assist the organization in understanding its strengths and challenges. At the conclusion of the assessment, the board and staff can identify a priority challenge; the organization can then apply for a Nonprofit Toolbox grant in the next cycle to address it. *\*Receiving an Organizational Assessment does not guarantee the organization will receive an Operational Capacity grant in the future.*

### Operational Capacity

Operational Capacity grants are for organizations that have identified a specific project that will strengthen organizational operations and capacity. *Although the Foundation partners with the [Georgia Center for Nonprofits'](#) Nonprofit Consulting Group to implement these awards, Operational Capacity grantees are not required to contract with consultants associated with our partner to complete their Nonprofit Toolbox project.* Nonprofits that choose to contract with consultants not affiliated with the Georgia Center for Nonprofits may request up to \$15,000; grantees may receive partial funding and should be prepared to supplement the Toolbox award with other funds.

Operational Capacity grantees will be required to make a cash contribution of 5%-10% of the cost of the consulting engagement (\$250-\$1,500) based on the organization's budget; see page 7 for complete details. Organizations may only have one open Operational Capacity Grant at a time. Operational Capacity grants typically cover the following areas:

- ◆ **Strategic Planning:** An award in this area might include assistance with stakeholder interviews, conducting an environmental scan, outlining priorities/goals, defining strategies to implement goals and identifying ways to measure strategic plan goals.
- ◆ **Board Development:** An award in this area might include an assessment of the skills, expertise and diversity present or needed on the organization's board and the development of a strategy to recruit board members who fill the gaps. It could also include working with the board to clearly define its role and to develop committees and processes to fulfill its role.
- ◆ **Financial Management:** An award in this area might include working with designated staff and board members to evaluate, develop and refine the organization's financial processes such as billing, payables, budget creation and monitoring, and working through audit compliance issues.
- ◆ **Resource Development:** An award in this area might include an assessment of current fundraising capacity and a plan for future fundraising strategies. This could be the creation of a general fundraising plan or a plan focused on a specific revenue category (major gifts, individuals, planned giving, etc.). Note: Requests for prospect research will not be considered.
- ◆ **Succession Planning:** An award in this area might include developing a succession plan for the organization's staff leader and senior management staff positions, or supporting an organization undergoing an executive transition.
- ◆ **Human Resources:** An award in this area might include an update of hiring processes and performance review systems.
- ◆ **Marketing Planning:** An award in this area might include an assessment of current marketing capacity and a plan for future marketing strategies.

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## Technology

The Foundation partners with [TechBridge™](#) to support nonprofits seeking to build their organization's capacity through technology upgrades. Organizations that have an open Operational Capacity Toolbox grant with the Foundation are eligible to apply for Technology Assessment and Implementation awards, regardless of whether the current Operational Capacity Toolbox project is complete.

- ◆ **Assessment Awards:** A detailed technology assessment is critical to help a nonprofit understand where the organization is now, what its goals are and how it can best leverage technology to reach these goals. The assessment is conducted by TechBridge staff, who walk nonprofits through the technology planning process, from creating a vision of how technology could be most effective in the organization, to assessing and prioritizing its needs, and generating recommendations that can be shared with the nonprofit's board, staff and potential funders.\* Please note, while technology assessment awards can address a wide range of database challenges, the Foundation is not accepting requests for HIPAA compliance assistance at this time.
- ◆ **Implementation Awards:** Implementation Awards are intended to support the costs of carrying out actions identified through the Assessment. Implementation Awards are carried out in partnership with TechBridge, which will provide acquisition advice and access to discounts and support with the implementation of the needed hardware/software solution.

Organizations are required to complete a Technology Assessment from TechBridge within the last 24 months before applying for an Implementation Award.\* TechBridge Technology Assessments may be completed through a previous Nonprofit Toolbox Award or through contracting directly with TechBridge. Organizations seeking Implementation Awards must also secure a \$1:\$1 financial match and can request up to \$10,000; see page 7 for complete details.

*\*Receiving a Technology Assessment through Nonprofit Toolbox does not guarantee the organization will receive a Technology Implementation grant in the future.*

# Eligibility

## ELIGIBLE ORGANIZATIONS

Nonprofits that meet the following requirements are eligible to apply for a grant from the Nonprofit Toolbox:

- ◆ Must be located and providing services within the Foundation's 23-county service area;
- ◆ Must be classified by the U.S. Internal Revenue Service under Section 501(c)(3) of the I.R.S. code as a nonprofit, tax-exempt organization, donations to which are deductible as charitable contributions under Section 170 (c)(2), and the I.R.S. determination must be current;
- ◆ Must be registered with the Georgia Secretary of State as a nonprofit (click here to verify: <https://ecorp.sos.ga.gov/BusinessSearch>);
- ◆ Must have a minimum two-year operating history after the date of receipt of its 501(c)(3) classification;
- ◆ Must have annual operating expenses greater than \$75,000 as reflected in the most recently filed I.R.S. Form 990 (click here for more information on Form 990: <https://www.irs.gov/Charities-&-Non-Profits/Form-990-Resources-and-Tools>);
- ◆ Must have at least one full-time paid employee (paid minimum wage or more, working at least 35 hours per week, classified as a W-2 employee) for the 12 months prior to submitting an application (*please note that contractors or consultants do not count toward this requirement*); and
- ◆ Must have filed the end-of-grant report for any previous Nonprofit Toolbox award. (See page 9 for details.)

## INELIGIBLE ORGANIZATIONS

The following organizations are not eligible to apply for funding:

- ◆ Private and publicly funded schools (K-12) and institutions of higher learning. This does not include nonprofit charter schools;
- ◆ Organizations that exclusively raise funds for publicly funded schools (K-12), institutions of higher learning and government agencies;
- ◆ Organizations that require participation in religious services and/or education as a condition of receiving services; and/or
- ◆ Organizations that have discriminatory policies and/or practices on the basis of race, color, national origin, age, disability, sex/gender, marital status, familial status, parental status, religion, sexual orientation, genetic information or political beliefs.

## INELIGIBLE REQUESTS

- ◆ Applications for consulting services that take place outside the grant period (see page 7 for grant period); and/or
- ◆ Applications requesting cash grants to pay for staff salaries or expenses associated with infrastructure challenges;
- ◆ Applications requesting support for HIPAA compliance; and/or
- ◆ Applications requesting support for programmatic outcome measurement.

**2018 SCHEDULE**

<b>Winter cycle</b>	Friday, March 2, 2018 at noon	Application deadline (Complete applications include an Organizational Profile, Common Grant Application and Toolbox Grant Application Supplement)
	By Friday, May 18, 2018	Applicants notified of funding decision
	June 1, 2018-July 31, 2019	Grant period
<b>Fall cycle</b>	Friday, August 31, 2018 at noon	Application deadline (Complete applications include an Organizational Profile, Common Grant Application and Toolbox Grant Application Supplement)
	By Friday, November 16, 2018	Applicants notified of funding decision
	December 1, 2018-January 31, 2020	Grant period

**HOW TO APPLY**

A complete application includes an Organizational Profile, Common Grant Application and a Nonprofit Toolbox Grant Application Supplement. These are all completed through the Foundation's Nonprofit Online Portal. Click [here](#) to access the Nonprofit Online Portal.

**TIPS FOR COMPLETING THE APPLICATION**

- ◆ [Instructions for Completing the Organizational Profile](#)
- ◆ [Instructions for Completing the Common Grant Application](#)
- ◆ [Nonprofit Toolbox Application Supplement Instructions](#)

**GRANTEE CONTRIBUTIONS**

Operational Capacity applicants are required to contribute 5% to 10% of the consulting budget, based on the organization's budget. Organizations with budgets under \$250,000 will be required to contribute 5% of the consulting costs; organizations with budgets over \$250,000 will be required to contribute 10% of the consulting costs. Consulting costs vary based on the type of project; grantee contributions are expected to range from \$250 to \$1,500.

Technology Implementation applicants are required to match \$1:\$1 and can request up to \$10,000 from the Nonprofit Toolbox. Match funds (cash or a combination of cash and in-kind) can be fulfilled as follows: any portion of the project's cost paid directly by the nonprofit or its donors/funders; new equipment purchased specifically for this program at the expense of the nonprofit; services donated by a third party, if the nonprofit can provide appropriate documentation of the value of services.

# Process

## IF AWARDED, HOW IT WILL WORK?

- ◆ Following the notification of the funding decision by the Foundation, grantees are contacted by Foundation staff who explain the process for selecting a consultant and what to expect throughout the grant. Depending on the nature of the award, Foundation staff will connect the grantee with the Georgia Center for Nonprofits (GCN) or TechBridge to begin the consulting engagement.
  - When an Organizational Assessment is awarded, it will be done by a professional consultant with the participation of the organization's staff and board. Assessments are conducted by either a GCN staff member or an outside consulting firm.
  - When an organization receives a Technology Assessment Award or Technology Implementation Award, the grantee will work with staff from TechBridge.
  - When an Operational Capacity grant is awarded, the grantee will work with GCN staff to identify an appropriate consultant. The grantee will contract for the mutually agreed-upon services that will include a project plan and timeline, specific outcomes stated in the award and a declaration of time commitment by all parties. If grantees choose to contract with consultants not affiliated with GCN's Nonprofit Consulting Group, they may have to supplement the Nonprofit Toolbox award with funding of their own in order to make up the difference in fees.
- ◆ Nonprofit Toolbox projects are considered completed when the identified project outcomes are met and evaluated. Depending on the project, it may take one to 12 months to complete the work.
- ◆ Grantees are required to submit an end-of-grant report immediately following the completion of the Nonprofit Toolbox project; a link to the report will be provided to the grantee by staff from GCN, TechBridge or the Foundation. The electronic report is utilized in assessing the immediate impact of the grant and the effectiveness of the Nonprofit Toolbox program and consultants.
- ◆ With the exception of Technology Awards recipients, grantees are required to meet with a GCN staff member 12 months following the completion of the Nonprofit Toolbox project to report on progress toward the project's long-term goals. This is required regardless of the consultant with whom the grantee contracted. A link to the report will be provided by staff from GCN or the Foundation.

## HOW DO I LEARN MORE ABOUT THE NONPROFIT TOOLBOX?

The Community Foundation staff will provide one online orientation session on **Tuesday, January 23 at 1:30 p.m.** It will be recorded. The webinar recording be available on the [Nonprofit Toolbox](#) page after January 23. If you have any questions, email us at [NonprofitEffectiveness@cfgreateratlanta.org](mailto:NonprofitEffectiveness@cfgreateratlanta.org).

**MAY I APPLY FOR MULTIPLE TOOLBOX AWARDS IN ONE APPLICATION DEADLINE?**

Organizations may submit two Nonprofit Toolbox requests during the same application deadline, either two Operational Capacity requests or one Operational Capacity request and one technology request. Organizations that wish to submit two applications must contact the Foundation at [nonprofiteffectiveness@cfgreateratlanta.org](mailto:nonprofiteffectiveness@cfgreateratlanta.org) at least 10 business days before the application deadline to be given access to a second application form. Please note that while organizations may submit two applications, organizations will only receive one Operational Capacity grant per deadline. The Foundation prioritizes requests for strategic planning over other Operational Capacity request types.

**MAY I APPLY FOR A SECOND TOOLBOX IF I HAVE A CURRENT TOOLBOX GRANT OPEN?**

- ◆ *If applying for Organizational Assessment or Operational Capacity:* Organizations must complete an end-of-grant report for any previous Organizational Assessment or Operational Capacity Toolbox awards before applying.
- ◆ *If applying for Technology Assessment:* Organizations that have an open Organizational Assessment or Operational Capacity Toolbox grant are eligible for Technology Assessment, regardless of whether the current Organizational Assessment or Operational Capacity Toolbox project is complete and an end-of-grant report has been filed.
- ◆ *If applying for Technology Implementation:* Organizations must complete and file the end-of-grant report for any open Technology Toolbox awards before applying for Technology Implementation. However, organizations that have an open Organizational Assessment or Operational Capacity Toolbox grant are eligible for Technology Implementation, regardless of whether the current Organizational Assessment or Operational Capacity Toolbox project is complete and an end-of-grant report has been filed.