AGENDA

Verdant Health Commission

Grants Team:

Lisa Edwards
  Superintendent

Leslie Silverman
  Interim Director of Community Impact and Grantmaking

Erin Boehm
  Grants Support

Visit Verdant Health Commission website for full staff listing and backgrounds.

Commissioners:

Carolyn Brennan

Jim Distelhorst, MD
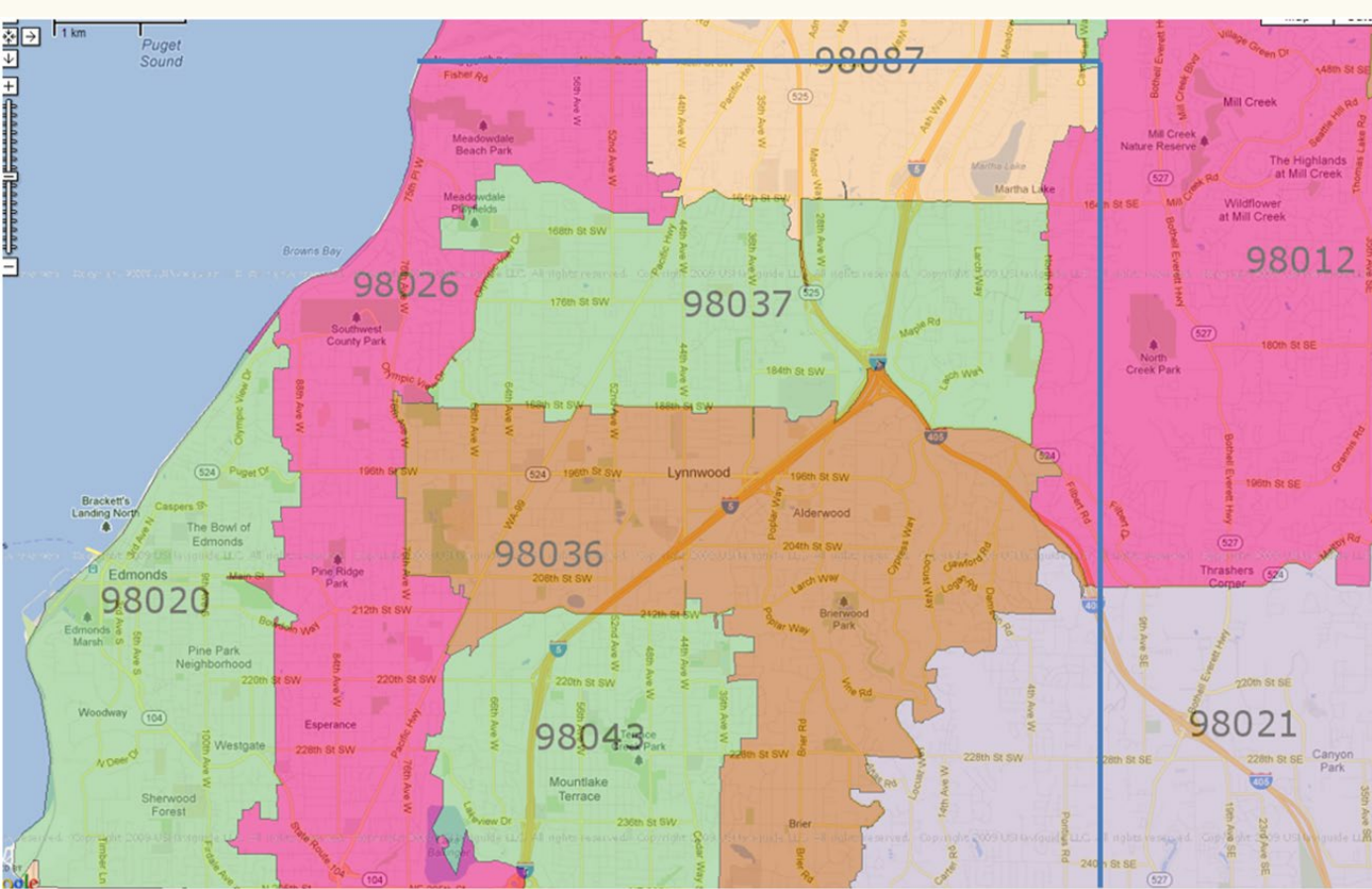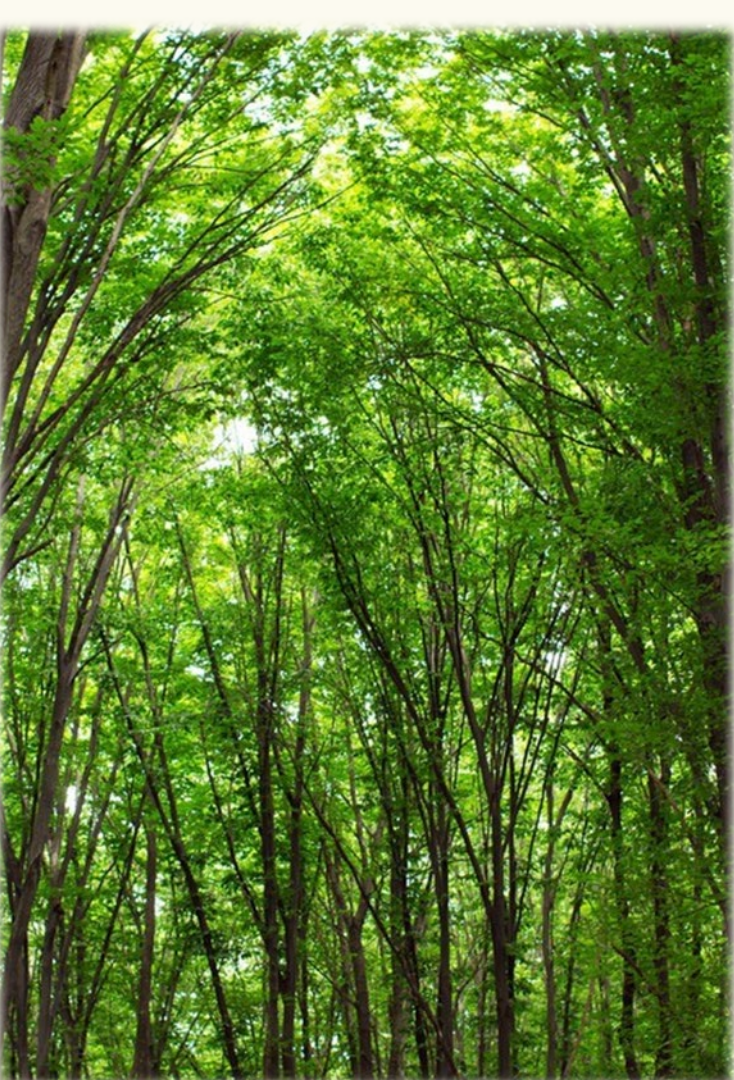

Bob Knowles

Deana Knutsen

Karianna Wilson

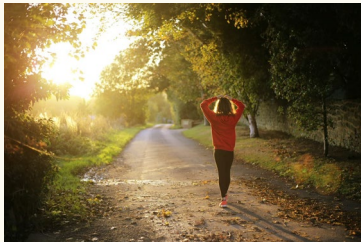# Funding Priority Areas and Timeline

VERDANT PRIORITY AREAS

Mission
To Improve the health and well-being of our whole community.

Mental Health

Healthcare Access

Food Security

Grantmaking Changes for 2023 and 2024

To Funding Approach

- Two grant application cycles per year:
  - November 1 (subject to change) *for contracts beginning April 1*
  - May 1 *for contracts beginning October 1*

- Annual grants – no guarantee of renewal or continual funding. No multi-year contracts

- No renewal funding (will need to re-apply on an annual basis)

- No new COVID-19 funding

To Online Application

- Select a primary and secondary priority area of funding

- Statement of Financial Need for the Funding

- List of Co-Funding Sources

- New confirmation page in the online portal to affirm understanding of funding guidelines

Must be serving South Snohomish County residents (see district map)

Prioritize direct program expenses

Prefer one application per organization, with up to two priority areas

No minimum/maximum request (The average 2022 award was approx. $100,000)

Will not be awarded for the benefit of an individual person, for political or religious uses, to retire debt, or strictly for fundraising purposes

Will not be awarded in this cycle for programs that are solely capital and equipment requests

FUNDING PARAMETERS

Application Timeline

November 4–December 2, 2022

Applications Accepted

January 2023

Board Committee Review

April 1st, 2023

Contracts Start

December/January

New Applicant Commissioner Meetings

November 1, 8, 15

Community Q&A Session

January 30, 2023

- Full Board Review
- Communication to all Applicants

May 1, 2023

Next Applications Window Begins

Review Funding Guidelines

- Review eligibility criteria, priority areas, and service area boundaries.

Ask Questions

- Follow Verdant website for Q&A calls in November and FAQ updates on website

Enter ONLINE Portal

- Create an organization profile in Fluxx so you are ready to begin the application process.(allow three business days for approval)

Submit Application

Dec 2nd

- Complete the application and attachments in Fluxx and submit.
- Be sure to submit before the deadline!

Internal Review

- Applications will be reviewed and scored internally by staff and board committees, before final recommendations are sent to the board for final decision.

New Applicant Meeting

- If you have never received funds from Verdant, you will be invited to a meet and greet with two members of our board.

Final Decision:

- Final decisions will be made in public board meetings, which you are welcome to attend.

Application Approved?

Contract Term April 1-March 31

- The grants team will contact you to initiate contracting.

If your application is declined:

- Please consider reapplying in subsequent funding cycles.
- Arrange a time to discuss next steps with the grants team.

Community Impact/DEI:

Up to 40 points

Opportunity/ Community Need:

Up to 25 points

Implementation:

Up to 20 points

Desired Outcomes:

Up to 15 points
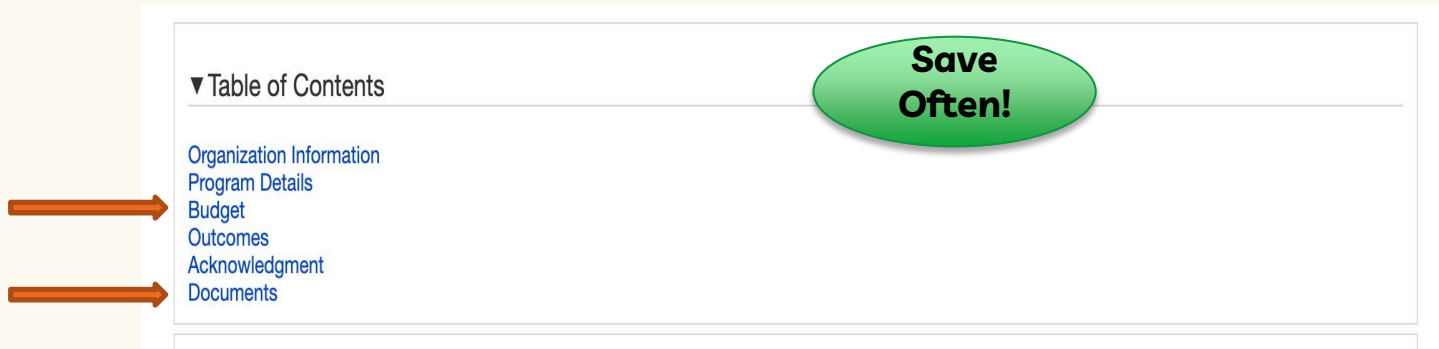
SCORING CRITERIA

Budget Section

The Online Portal

Technical assistance can be found on Verdant website, **Funding Opportunities→ Resources**, for any of the following:
a) **Register my organization** through the portal
b) Add an organization **CONTACT** through the portal
c) Begin my **REQUEST** (application)

OVERVIEW:

- **6 application sections** (all questions are on Funding Guidelines in PDF on website)

▼ Table of Contents

Organization Information
Program Details
Budget
Outcomes
Acknowledgment
Documents

Save Often!

- **Each section must be filled out completely in order to submit**

Program Budget versus Operating Budget

Writing a budget for a grant is not the same as creating your organization's operating budget.

While an operating budget details your expected revenue and expenses for the coming year, a grant budget outlines the costs associated with the project you're seeking to fund for the period of time the grant covers.

Preparing the Budget

▼ Budget

⚠ Please use the + button below to add the budget for your Verdant request.

More information: *How to Fill Out your Budget*

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Grantee Budgets

Budget Period	Budget
Sam Smith: 11/4/2022 to 12/31/2023	40,300
Total	40,300

Budget Snapshot

	Sam Smith 11/4/2022 to 12/31/2023 Budget
Personnel Costs	35,000
Direct Program Costs	4,000
Indirect Costs (10% max)	1,300
Other	0
Total	40,300

Check to be sure budget amount = request amount

Preparing the Budget

Save Often!

Add Grantee Budgets ✕

Grant Summary Information

Organization Name: Zoe's Pet Palace
Amount:
Request ID: R-202211-00646
Start Date:
End Date:

Name*

Start Date*

End Date*

Budget Details

Item	Budgeted	Actual
Personnel Costs		
Direct Program Costs		
Indirect Costs (10% max)		
Other		

Please Note: Most applicants should enter one year term 4/1/2023-3/31/2024 unless you are a current grantee with end date of 6/30/23. In which case, you would apply for a 9-month grant beginning 7/1/2023 – 3/31//2024

Personnel Costs

❑ Includes the salary and benefits of organization staff directly supporting the program. In other words, only list the paid personnel that relate to the project in the grant application.

❑ It is at the applicant's discretion whether to list salaries in sum or by full-time equivalents/position.

❑ Utilize the notes section of the application to indicate full-time equivalents, roles, or other information to explain the budget request.

BUDGET CATEGORIES

Direct Costs

❏ Expenses that are allocated to a specific program (i.e. training costs, materials, transportation)

❏ Utilize the **notes section** to explain calculations for large amounts.

   For example
   Travel/transportation costs: Include information like the number of trips planned and the number of days and people for each trip

▼ Optional Comments

Please include any comments below, including line item breakdowns for the budget entered.
Personnel Costs

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Direct Program Costs
Please include the breakdown of budget spent on:
Travel / Mileage
Equipment
Supplies
communications
Mail / Postage

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These are expenses that would not exist if not for the existence of the funded program.

Indirect Costs

- Expenses that are not specifically allocated to the funded scope of work or function of the funded program

- These are also termed as overhead charges. Particulars such as electricity bill, water, library membership, accommodation charges, administrative charges, etc. are included in indirect costs.

- Expenses that are allocated to support multiple programs/locations

- Verdant funding supports indirect costs up to 10% of request

Minor Capital Costs

Minor capital costs are allowed up to $5,000 in aggregate with useful life of more than one year.

What Verdant Funding <u>cannot</u> support:

- Requests for individuals, pledges, sectarian or religious purposes, political lobbying/campaigns, major capital expenditures, and scholarship funds.

- Subcontracting is not allowed without the written consent of Verdant not less than 15 days prior to the date of any proposed assignment.

General Tips

✓ Step 1: **Understand the funder's requirements.** Before preparing your program or research grant budget, check the format required.

✓ Step 2: **Work with your colleagues to determine costs.** Creating the budget justification for grants requires working with the team members who'll be running your program or project to figure out their anticipated needs and the associated costs.

✓ Step 3: **Make sure your grant budget aligns** with your narrative.

General Tips

- ✓ Understand the time period covered by the grant and it will allow you to create a similar timeline for your budget.
- ✓ Be specific and concise in budget notes:
  - Elaborate on the larger expenses and justifications.
  - Offer detail where it is needed; there is no need to be extremely verbose over smaller expenses (e.g. pens).
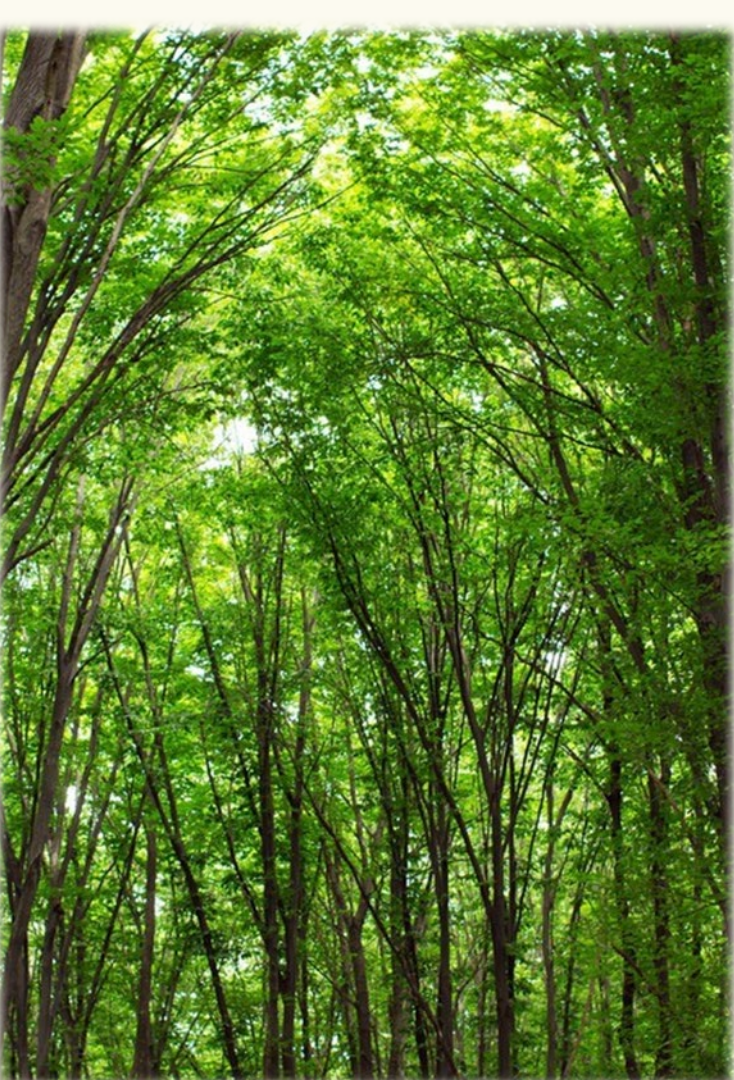
Attachments Section

Attachments

Click on "Document Uploads" for useful tutorials.

▼ Documents

All applicants are required to upload a current roster of their Board of Directors and two years of financial statements/audits.

If you indicated a partnership(s) that provides facilities and/or roles that are critical to meeting your outcomes, please also upload a letter of support from each partner.

Please use the + button beside the document names below to upload the following documents:
1. List of organization's Board of Directors with their affiliations
2. Two years of organization's financial statements and audits. Audit requirements may be waived for small organizations

Note: You can use the + button in the Request Documents box to upload additional documents.

More information: Document Uploads

1. Financial Statements or Audits   ⊕

2. Required Documents   ⊕

3. Optional Documents

4. Organization Documents

▼ Documents

Please use the + button beside the document names below to upload the following documents:

1. List of organization's Board of Directors with their affiliations

2. Two years of organization's financial statements and audits. Audit requirements may be waived for small organizations

Attachments – 1. Financial Statements or Audits

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Upload files
Select or drag files then start upload   X

Filename		Size	Status
Attachment Example.pdf	Financial Statements or Audits ⌄	1 MB	0% ⊖

Applicants and grantee organizations that have annual operating expenses greater than $3,000,000 are required to provide Verdant with a copy of a financial audit performed by an independent accounting firm. Audited financial statements must be provided to Verdant annually.

| Add files | Start upload | | 1 MB | 0% |

Attachments – 2. Required and 3. Optional Documents

Upload files
Select or drag files then start upload

X

Filename		Size	Status
Attachment Example.pdf	Application Snapshot ⌄	1 MB	0% ⊖

Application Snapshot
Board of Directors
Financial Statements or Audits
Letter(s) of Support (if indicated)
Other Document

Add files   Start upload   1 MB   0%

Save Often!

Attachments – 4. Organization Documents

Upload files
Select or drag files then start upload

X

Filename		Size	Status	
Attachment Example.pdf	Annual Report ▾	1 MB	0%	⊖

Annual Report
Audited Financial Statements
Board of Directors
Bylaws
Current Financial Statements
Organizational Budget
Other Document
Registration
Year - End Financial Statements

Add files   Start upload   1 MB   0%

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Additional Nonprofit Finance and Budget Resources

Washington Nonprofits – see Learning Library guide for understanding organization-level budgets and financial reports: *Finance Unlocked for Nonprofits*
https://nonprofitwa.org/download/finance-unlocked-for-nonprofits-guide/

Candid.org – "what do funders look for in a grant budget" blog post
https://blog.candid.org/post/what-do-funders-look-for-in-grant-proposal-budgets/

GrantAdviser.com - https://www.grantadviser.com/budget

Asana – Creating a budget template for your project
https://asana.com/resources/budget-proposal-template

Online Application Tutorials

The Annual Application video guides and other resources can be accessed on the Verdant Website

Additional Q&A Sessions and Technical Assistance

To help support prospective applicants with clarifying questions and technical assistance with the portal in preparation for the December 2nd submission deadline, the Verdant grants team has hosted <u>three</u> recorded Q&A calls with each recording provided on our website, under Funding Opportunities. Please check often for updated frequently asked questions.

Application Template

Link provided at the beginning of application

Scorecard to be posted after board approval tomorrow

Application Deadline

December 2, 2022, at 5 p.m.

**Contact the Grants Team at
grants@verdanthealth.org**

Questions?

CHECK US OUT!

Open the camera on your smartphone and hover over the code above.

verdant
HEALTH COMMISSION