Crafting the Grant for the Long-term

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What challenges have you seen grantees face in achieving financial resilience?
Financial Resilience in Nonprofit Organizations

- **VALUES**
- **PRACTICES**
- **RESOURCES**

- Effective Leadership Team
- Inclusive
  - Mission-Focused
  - Continuously Improving
  - Data-Driven

- Sustainable Business Model
- Performance Management
- Capital for Change & Security

- Planning

FMA
1. How can you assess your grantees’ financial health and resilience?

2. How do you engage grantees in conversations about their resilience?
Grants for Resilience

- Capital
- Operating
- Capacity
Grants for Resilience: Capital

**Type of Capital**

- Operating Reserve / LUNA
- Facility Reserves
- Change Capital
- Endowment

**Resilience Goal**

- Liquidity
- Security
- Maintaining & Replacing Facilities
- Growth & Expansion
- Innovation (R&D)
- Replenishment
- A base to generate revenue in perpetuity
Grants for Resilience: Operating
Grants for Resilience: Capacity

To Grantee
- Hire Consultant
- Fund Position

To Capacity-Builder
- Provide Training or TA
- Develop Learning Community
- Provide Capacity

To Collaborative
- Provide Training or TA
- Provide Shared Services
Panel Discussion

• Elena Chávez Quezada  
  *Walter & Elise Haas Fund*

• Josh Miller  
  *Jim Joseph Foundation*
1. What types of long-term support are you interested in providing?
2. What barriers might you face?
3. How will you make the case to do it?
Resources

- **Keeping It in Reserve: Grantmaking for a Rainy Day** *(NPQ, March 2017)*
- **How to Think Differently About Your Money: Capital Explored** *(NPQ, April 2017)*
- **The Benefits of Multi-year Grantmaking: A Funder’s Perspective** *(PhilanTopic, January 2013)*
- **The New Normal: Capacity-Building During a Time of Disruption** *(Open Impact, May 2018)*
- **Demystifying Nonprofit Capacity Builders: Knowing When and How to Partner with Capacity Building Organizations** *(Philanthropy CA & GEO, May 2018)*
To Serve and Reserve: The Action Trust

Presented by Nonprofit Quarterly

June 27 at 11am PT

Explore an emerging trend among forward-thinking funders and their grantees – funding strategic reserves. Hear from the Greater New Orleans Foundation and one of their grantees about their successful operating reserves challenge grants.
In collaboration with the Wallace Foundation, FMA has created a library of tools and resources to help organizations become “fiscally fit”

Four Topic Areas: Planning | Monitoring | Operations | Governance

Planning Resources for Nonprofit Financial Management
Good planning finds the most effective ways to deploy your organization’s resources — and meet your overall objectives. Materials here include help with budgeting, cost calculations and cash projections.

Strengthening the Budget Development Process
Established in 1999 to serve not-for-profit organizations around the country

Provides customized financial management, accounting, software, organizational development, and other consulting services

Works directly with organizations or through funder-supported management and technical assistance programs

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