

Module 3: Best Practices

To complete this module, you will need to visit FaithfulEngagementRVA.com and print off the Sample Grant application for each participant.

“I have found that among its other benefits, giving liberates the soul of the giver.” Maya Angelou

“The best way to find yourself is to lose yourself in service to others.” Mahatma Gandhi

In Module 2, we conducted an inventory of our how we have deployed our financial and volunteer resources over the past five years to see if any patterns and priorities emerged. We asked and answered questions about alignment and accountability. In this module, we learn about best practices that we can utilize to ensure alignment and to accomplish accountability.

Look and Learn before You Leap:

As we’ve discussed, the human needs in our region are many and varied. And when compassionate people see a need, our instinct is to respond as quickly as possible. Sometimes that instinct places people on the path of establishing a new nonprofit. But before you leap, look and learn. Look out and scan the current environment. Are there nonprofits already in place that are seeking to meet the specific needs, populations, neighborhoods where we see even more need?

Several organizations host databases that can facilitate your scan of the nonprofit universe:

Hands On Greater Richmond, handsonrva.org

The Community Foundation, giverichmond.guidestar.org

United Way of Greater Richmond & Petersburg, yourunitedway.org

If there are nonprofits already working on the needs your faith community wishes to address and the neighborhoods you seek to serve, then the next step is to evaluate the business models and practices of these nonprofits.

Begin with their website. The nonprofit's website should indicate the year the nonprofit was established, the focus of their work, the number of staff, a list of volunteer leaders (Board of Directors), major donors and partners, and whether the nonprofit utilizes volunteers to execute their work.

Responsible Stewardship:

To facilitate a uniform approach to decision-making when it comes to funding non-profits, many faith communities use a grant process. Some communities employ an open process allowing any and all nonprofits to apply for funding, while others invite specific nonprofits to apply. If your congregation has identified its funding priorities, an invitation strategy that aligns with those priorities probably makes the most sense.

A grant process/application provides the faith community with . . .

A time table for decision making;

A basis by which to compare requests;

A snapshot of the organization's fiscal health;

An accountability matrix

A grants process/application provides the nonprofit with . . .

A reliable and timely protocol for requesting funds;

A platform to education about their work;

The process and application serve several purposes: from the perspective of the faith community, it creates a time table for the decision-making process and a basis by which to compare the various requests for financial assistance. The grant application generates a synopsis of the fiscal health of the nonprofit, a written record of how the money will be deployed, when the money will be spent, and who will benefit; in short, an accountability matrix. From the perspective of the nonprofit, a grants process/application creates a reliable and timely protocol to follow and provides a platform to educate generally about their mission and specifically about how the funds will be used.

Facilitator's Note—Pause the video and disseminate the sample grant application. Ask participants to review the application.

Resume Video

Missions & Outreach

Request for Funding

*Preamble stating the giving priorities of the faith community—
whether focused geographically or on specific needs, e.g., hunger,
housing, health care.*

Date _____

Name of Organization _____

Address _____ Zip _____

Telephone _____ Web Address _____

Contact Person _____ Title _____

Telephone _____ Email Address: _____

1. Amount of funding requested: \$_____
2. Please provide a clear, succinct description of the project for which funds are requested, including the date of the project/event (if applicable) and how--specifically--the funds will be utilized:
3. Is this a new program? Yes/No Is this program one-time or ongoing?
4. The approximate number of people who will benefit from this program:
5. Is the project/program tied to a specific neighborhood or geographic area?
6. What are the primary organizations with which you partner?
7. What other organizations provide similar services in the area in which your organization operates?
8. How much money has been raised to date, and what are your other sources of funding for this specific project?

9. Information about your organization:

- A. Briefly describe your organization: date of inception, mission, significant accomplishments, etc.
- B. Please identify your organization's primary sources of annual income, noting the approximate percentage of funding from each of the following:
- Government _____ Corporate _____ Individual Donors _____
- Foundations _____ Faith Communities _____
- C. Please list the faith communities that provide financial support to your organization (if numerous, listing a minimum of three is sufficient).
- D. Please enclose copies of the following:
- IRS letter of exemption from federal income tax payment under section 501 c (3);
 - Latest copy of IRS form 990 or equivalent
 - Most recent balance sheet and operating statement
- E. To the best of your knowledge, please list any staff members or lay members who are affiliated (volunteer) with the organization.

10. Have you applied for and/or received funds from us during the last two years?
Yes _____ No _____ If yes, list the amounts(s):

11. Is there non-monetary support that our faith community might provide? (Please be specific.)

12. Are there volunteer opportunities for our members—either on our campus or in the community? Are there intergenerational volunteer opportunities—children, youth, parents, seniors? (Please be specific.)

13. Regardless of the funding decision made, may we share these volunteer opportunities with our members?

Signature of Chief Staff Executive of Applying Nonprofit

Application Deadline/Contact Information of Lay Leader Collecting the Grants

Within one month of the event/project completion or within three months of the receipt of the grant if the funds are for ongoing operational expenses (but no later than X date), please submit the following project summary:

1. Name of Project/Event (if applicable)
2. Date(s) of Project/Event
3. Estimated # of individuals served
4. Estimated # of volunteers from our faith community
5. A **one paragraph** synopsis of the specific use of the funds which illustrates the impact of the grant received.
6. One photograph that is illustrative of the project/work.

Note that the grant application includes a requirement that the nonprofit provide its most recent IRS 990 form and its most recent financial statements covering a full fiscal year.

Evaluate grants by asking:

--Alignment?

--Fiscally sound?

--Funding operations or projects?

--# of people served?

--How volunteers are deployed?

In evaluating each grant application, questions to consider include:

- Is the work of the nonprofit aligned with the region's most pressing needs and the funding priorities of our community?
- Is the nonprofit fiscally sound?
- Are the funds requested for ongoing operational needs or specific projects? Does that matter to us? Do we have a preference for funding operations or specific projects?
- Is the nonprofit clear about how the funds will be utilized and the number of people they anticipate serving?
- Is the nonprofit specific about how volunteers will be deployed?

While some congregations may wish to disseminate awarded funds in one allocation, others may choose to disseminate the funds in installments throughout the year. The timing of the release of funds should be made clear in the grant award letter. All nonprofits receiving funds should be required to provide a written report, annually, of how the funds were utilized. This report should provide an understanding of:

How the money was used;

How the money made a difference; and

How volunteers were utilized;

Communications: Inform, Invite, Inspire

While a small number of people might serve on the committee making the funding decisions, all members of a faith community can play an active role in the congregation's faithful and strategic engagement within the region—especially through their financial contributions and volunteer efforts. To capture and keep people's passion for service, a strategic approach to communications is essential.

First, if one does not exist, create a calendar that displays all of the service projects, mission trips, and supply drives the faith community supports throughout the year. Chances are there's lots going on, and there's lots of demand for more activities to be added. A calendar makes it easy to ask the spacing/pacing questions: Do we have enough space between events to adequately communicate about them? Will the pace of our work fatigue clergy, volunteers, and donors? If the answer to either of these questions is "yes," then consider the following ground rules: only one supply drive a month; and limit the drive to only two weekends of worship services. Institute one or two sabbath months a year, where a rest is taken and no service project or supply drive is scheduled.

Adequately communicating your faith community's engagement in the Richmond region isn't just about registering for a service project, it's all about developing an engaging way to inform, invite, inspire.

Inform . . . Before most people will squeeze another activity into a busy weeknight or give up a Saturday morning, they will want to understand the need they are helping to address through volunteering and the organization through which they are serving.

Invite . . . Make the ask compelling and make it easy for members to register for the service project or sign up to provide specific supplies.

Inspire . . . Upon completion of a project or a supply drive, it's critically important to report back to the congregation. The report should include measurable results in terms of supplies collected (X # of pounds of food), people served (40 men served lunch for a week), or work completed (an accessibility ramp built and installed). But of equal importance is a participant's

reflection on how they grew in their faith as a result of the experience. Never omit this last component.

Volunteers: Recruitment, Relevance, and Retention

Recruitment . . . A key to recruitment is to know your audience. If your congregation consists largely of families with children whose weekends are chock full of sports and other activities, then recruiting these families for Saturday morning service might prove difficult. The more you know about your congregation, the more strategically and successfully you will be able to craft service projects that work with their schedules and their preferred level of engagement. That's another best practice—throughout the year, create service projects that vary in intensity. Some congregants will be comfortable only with service projects held on the site of their mosque or synagogue; others will want opportunities to serve in areas of Richmond they have never before experienced.

Another key element of recruitment is communications. What are the means of communications and the communication platforms most often utilized by members of your faith community? Chances are you will need to deploy a variety of media to recruit volunteers.

Relevance . . . People want their service to matter in ways small and large. Here again thoughtful communications that connect the dots are key. If your congregation is collecting books for an undeserved elementary school and that's all they are told, surely some folks will supply the books. But if they are told that from kindergarten to third grade, children learn to read; from third grade on, they read to learn. And that reading on grade level by third grade is such a clear indicator of a child's future, that we predict our future prison population based on the number of children who reach third grade and cannot read on grade level, then perhaps the book supply drives lead to a volunteer reading program with the school. Perhaps the next supply drive is for food, so children can leave school on Friday with a backpack of food that will keep their bellies full until they return on Monday. *Connecting the dots between one human need and another and another is critically important to understanding the ecosystem of challenge and privilege that is metropolitan Richmond.*

Another element of relevance is understanding how all of our lives are interconnected. How is it that life on Jeff Davis matters to those who reside in Short Pump and vice versa? People of faith have the traditions and language that enable them to give specific voice to our connectedness.

Retention . . . The quickest way to lose a volunteer is to leave them idle. As tempting as it is to take an “all are welcome” approach, do not overbook a service project. If the nonprofit indicates that twelve volunteers are needed, do not recruit twenty. Better for twelve people to be exhausted than twenty people to be bored. Each service project should have a team lead. The team lead should be responsible for interacting with the nonprofit to gain an understanding of the specifics of the service project and what will be expected of the volunteers. During the project, the team lead should have as his/her first priority to ensure that all volunteers are actively participating at levels that are appropriate for them.

Within a couple of days of the conclusion of a project, all volunteers should receive a sincere thank you and a feedback opportunity that allows for anonymous comment. If possible, the team lead should send thank you notes that offer specific praise. While the nonprofit should undertake its own follow up with the volunteers, it is critically important that volunteers feel that their efforts were important to and recognized by their community of faith.

Discussion Questions – Pause after each question for discussion

What are your key learnings/take-aways from this session?

What best practice do we need to devote some attention to—stewardship of the dollars, communications, or volunteer recruitment/retention?

What are our next steps?