

“Enhancing Your Business Acumen and Grant Writing and Fundraising Skills” Regional Training Program Fall 2017

Part II

Linking grant writing and fundraising to business acumen principles



Presented by

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Handout 1

Sample Draft Abstract

____ County AAA will work in partnership with 3 area libraries (other entities? _____, If so, which? _____) to create an ongoing educational and enrichment programs for baby boomers+ which both provides ideas for successful aging (Including but not limited to our Medicare 101) and provides enrichment activities.) Other ideas for content _____

In our first year, we will aim for 10 sessions (Too many? Too few?) _____) Speakers will be from AAA staff, the local university, local artists and retirees with appropriate skills. Others: _____ . Will we need a budget for speaker fees? _____ What are other costs _____? Who might run it? _____? Could we get some volunteers? _____

We will seek both local grant and business sponsorships to defray some costs. Any ideas?

Having blanks and questions is very important. Why?

Handout 2
Exercise 1
Business Acumen and Your Draft Abstract

With the person next to you, discuss how the concept in the sample draft grant abstract meets the business needs of your organization.

Notes:

Handout 3
Exercise 2
Modifying Modules and Other Grant Sections

Assume you have found a Request for Proposal (RFP) that seeks to hire senior retiree vets.

1. You have needs assessment draft module that covers the usual demographics an AAA would have (# and % of seniors served, poverty levels, health status, etc).

What would you need to add to this module to make it appropriate for this grant opportunity?

2. You have a corporate capability module that focuses on your service area, staff, qualifications and experience, grant experience, awards, etc.

What would you need to add to this module to make it appropriate for this grant opportunity?

Handout 4
Exercise 3
Using The Timeline to Project Costs

Activity	Staff	Time Frame	Projected Costs (This column is for planning use only and never appears in the grant proposal)
Send two staff for training to qualify then to lead "Stop Falls Now"	Executive Director (S. Smith, MSW) Exercise consultant, D. Yung Program manager, J. Jones	Months 1-2	
Recruit 45 seniors in the intervention group and 30 for the comparison group	Program Manager, J. Jones Admin Assistant, R. Sanders	Months 1-4	

Handout 5

Locations of Foundation Centers,

<<http://grantspace.org/find-us>>

I. Upstate

Buffalo and Erie County Public Library - Central Library¹

Lafayette Square Buffalo, NY 14203
Phone: (716) 858-8900 Main URL: www.buffalolib.org/content/research#Foundation%20Center

Olean Public Library

134 N. 2nd St. Olean, NY 14760 phone: (716) 372-0200 Main URL: www.oleanlibrary.org/edata.html

Central Library of Rochester and Monroe County

Grants Resource Center 115 South Ave Rochester, NY 14604
Phone: 585-428-8132
Main URL: www3.libraryweb.org/central.aspx?id=114&ekmense=c57dfa7b_12_119_btlink

Finger Lakes Grants Information Center

Finger Lakes Grants Information Center 2 State St. Auburn, NY 13021
Phone: 315-252-7291
Main URL: flgic.org/foundation-center

Onondaga County Public Library

447 S Salina St Syracuse, NY 13202 Phone: 315-435-1900
Main URL: www.onlib.org/research/non-profit-resource-center/foundation-center-databases

Saratoga Springs Public Library

49 Henry St Saratoga Springs, NY 12866
Phone: (518) 584-7860 Main URL: guides.sspl.org/az.php

New York State Library

222 Madison Avenue Albany, NY 12230
Phone: (518) 474-5355 Main URL: www.nysl.nysed.gov/grantres.htm

Kingston Library

55 Franklin St Kingston, NY 12401
Phone: 845-331-0507 Main URL: www.kingstonlibrary.org/foundation.php

Adriance Memorial Library

Poughkeepsie Public Library District 93 Market St Poughkeepsie, NY 12601
Phone: 845-485-3445 Main URL: poklib.libguides.com/foundation_center

Newburgh Free Library

124 Grand St Newburgh, NY 12550
Phone: (845) 563 3645 Main URL: guides.rcls.org/grants

Mahopac Public Library

668 Rte 6 Mahopac, NY 10541
Phone: (845) 628-2009 Main URL: mahopaclibrary.org

Suffern Free Library

210 Lafayette Ave Suffern, NY 10901
Phone: 845-253-4380X13 Main URL: www.suffernfreelibrary.org/grants_and_foundations.aspx

II. New York City Metro

White Plains Public Library

100 Martine Avenue White Plains, NY 10601
Phone: (914) 422-1480 Main URL: whiteplainslibrary.org/funding-info/

Yonkers Public Library

Riverfront Branch One Larkin Center Yonkers, NY 10701
Phone: 914-337-1500
Main URL: www.ypl.org/fundinginformationnetwork

New York Public Library Bronx Library Center

310 E. Kingsbridge Rd. Bronx, NY 10458
Phone: 718-579-4250 Main URL: www.nypl.org/about/locations/bronx-library-center

Foundation Center Northeast (New York office)

32 Old Slip, 24th Floor New York, NY 10005
Phone: (212) 620-4230 Main URL: foundationcenter.org/ask-us/new-york

Brooklyn Public Library

Society, Sciences and Technology Division Central Library
10 Grand Army Plaza Brooklyn, NY 11238
Phone: (718) 230-2145 Main URL: www.bklynlibrary.org/locations

Queens Library

Social Science Division 89-11 Merrick Blvd
Jamaica, NY 11432 Phone: (718) 990-0700
Main URL: www.queenslibrary.org/research/foundation-center-grants

Levittown Public Library

One Bluegrass Lane Levittown, NY 11756
Phone: (516) 731-5728

Handout 6
Exercise 4
Possible Solutions to a Fund Raising Challenge

The Challenge	Creative Solutions
Board of Directors Non-Existent or Unwilling to Take on Fundraising	
No Staff Director of Development and None Forth Coming	
No Time At All for Existing Staff to take on a fundraising Role	

Handout 7

Regulations Governing Fund Raising

6652.3 Area agency fund raising.

(a) An area agency shall continue or initiate efforts to obtain support from private and public sources for OAA, CSE, and EISEP services.

(b) An area agency which is part of municipal government may solicit and receive funds from private sources pursuant to section 95-a of the General Municipal Law.

(c) An area agency which is a private organization may solicit funds from private sources, but may not charge the expenses of organized fund raising to OAA, as prescribed by the United States Office of Management and Budget circular A-122, attachment B (section 19(b)).

Handout 8

About Bill Lane and Carol Hegeman

William C. Lane retired after 25 years as a member of the faculty at State University of New York (SUNY) at Cortland and as Director of its Center for Aging and Human Services. He is a past president of the State Society of Aging of New York, as well as a past Treasurer and Fellow in the Association for Gerontology in Higher Education. Bill is now CEO of William Lane Associates LLC, a consulting firm located in Homer, NY. (www.williamlaneassociates.com)

Carol Hegeman was, for over 30 years, the Director of Research at the Foundation for Long Term Care in Albany, part of what is now LeadingAgeNY York. In that position, she conceived, wrote and (most importantly) managed over 30 grants in aging. She received the American Society on Aging's (ASA) 2008 Gloria Cavanagh Education & Training Award. Carol now operates Hegeman Consulting, a small firm focused primarily on grant writing training and coaching, curriculum development and training in the field of aging. She is a frequent presenter at national and state organizations devoted to aging services.

Together, Bill and Carol wrote the book "Grant Writing for Aging Services in Programs" published in 2017 and available at amazon.com.

Fun facts about Bill and Carol

Bill was a professional jazz musician. Carol is a returned Peace Corps Volunteer,

Contacts

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