

# Get Ready for Grant Success

RGV Nonprofit Summit  
October 30, 2024

Betsy Cox

Texas Department of State Health Services

# Overview

- Organizational Readiness
- Planning Your Project
- Researching Good Fit Funders
- Q&A



# Getting To Know You

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MISSION?



YEARS OF HISTORY?




GRANTS EXPERIENCE?

# DSHS Grant Development Center

- Grant Writing 101
- Grantsmanship & Nonprofit Management Resources
- Grantsmanship Glossary
- DSHS Data Resources
- Funding Resources
- Funding Opportunity Databases
- GDC Email Updates

[dshs.texas.gov/grant-applications-funding/grant-development-center](https://dshs.texas.gov/grant-applications-funding/grant-development-center)



## Grant Development Center

### Grant Applications and Funding

- Grant Development Center
- Data Resources
- Funding Opportunity Databases
- GDC Email Updates
- Grantsmanship and Nonprofit Management Resources
- Funding Resources
- Grant Writing 101
- Grantsmanship Glossary

### About the GDC


The Grant Development Center (GDC) provides grantsmanship education and health-related funding information for State of Texas residents. The GDC replaces the Funding Information Center (1990 to 2022). The GDC is part of the Department of State Health Services [Office of Practice and Learning](#).

The Funding Information Center (FIC) was established in January 1990 to serve as a statewide clearinghouse for funding information on HIV/AIDS-related programs. As mandated by the 1989 Human Immunodeficiency Virus Services Act (Texas Health and Safety Code, Title 2, Chapter 85, Section § 85.013 and § 85.014), the FIC researched and disseminated HIV/AIDS-related funding information to the Texas public. The Texas Legislature removed Section § 85.013 from the FIC mandate in April 2015. The scope of FIC coverage then expanded to include almost all public health interests and many social service issues.


### Contact Us

[grantcenter@dshs.texas.gov](mailto:grantcenter@dshs.texas.gov)

### What We Do



Communicate



Education & Training

Showing 1 - 3 of 7

[Grant Writing 101](#)

Grantsmanship topics to help you prepare to write and submit proposals.

[Funding Resources](#)

Selection of public and private funding entities for Texas grant-seekers.

[GDC Email Updates](#)

Funding opportunity announcements, trainings, and other items of interest from our bi-monthly subscription email list.

### Subscribe to GDC Email Updates

Click to subscribe

[Sign up for Updates](#)

# Organizational Readiness



**TEXAS**  
Health and Human  
Services

Texas Department of State  
Health Services

# Grant Process

## 80% Planning

- Readiness
- Research
- Relationships
- Writing
- Reporting

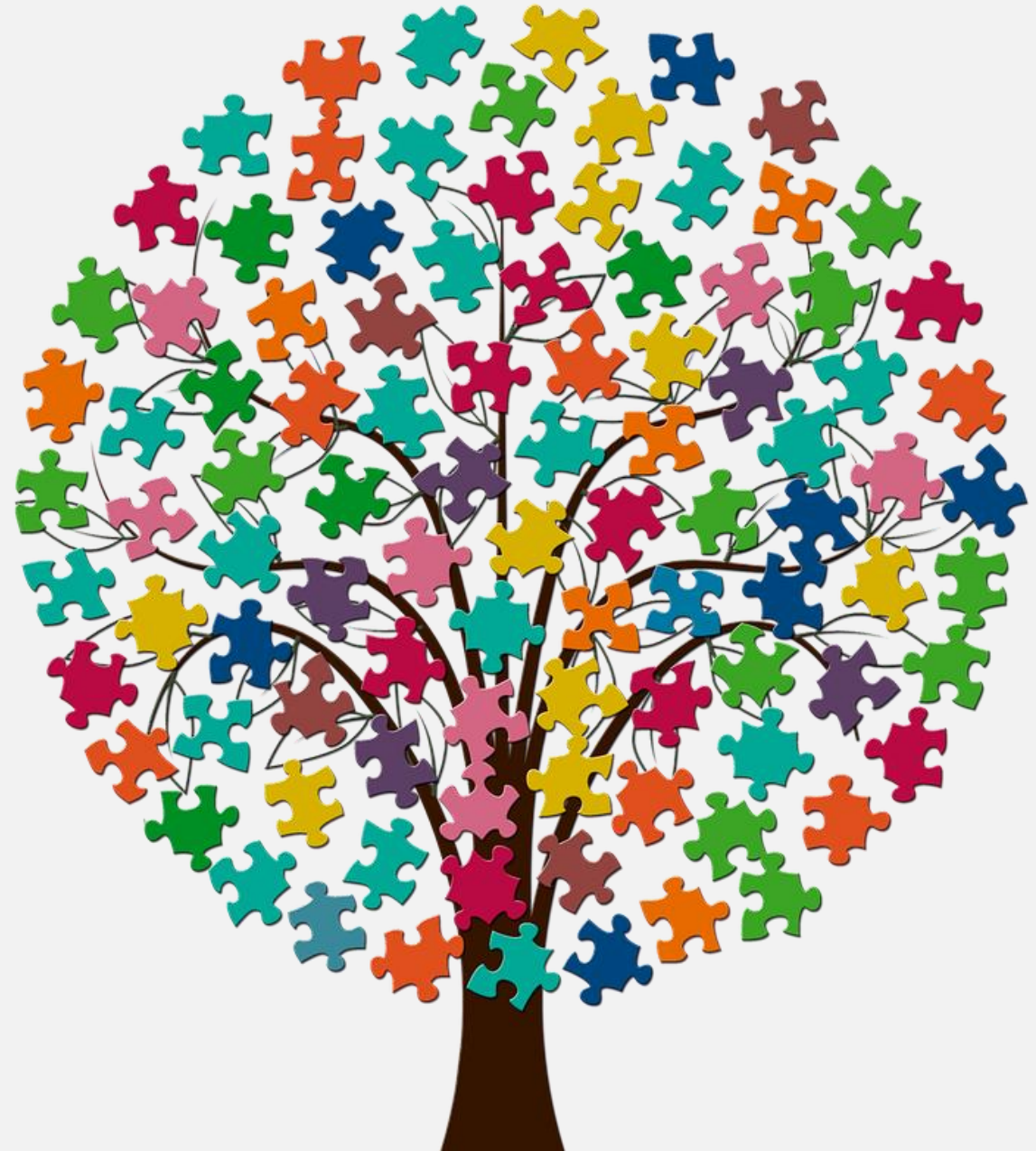




# Resource Development

## Your Grant Story

- Multiple Revenue Streams
- Annual Budget – Grants
- Grant Decision-Making
- Biggest Grant Challenges?



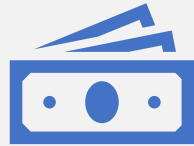
# Toolbox Documents

## Get Organized



### Organizational

Articles of Incorporation  
Board & Executive Bios  
IRS 501(c)(3) Letter  
Mission Statement  
History  
Strategic Plan  
Annual Report  
Social Media/Videos



### Financial

990 Tax Form  
Audited Financial Statement  
Boilerplate Language (donor & financial management systems)  
Funding Sources  
In-kind Resources  
Budgets



### Program

Program Descriptions, Goals & Objectives  
Organizational Needs  
Evaluation Capacity  
Story Bank  
Key Staff Bios & Job Descriptions  
Key Partnerships  
Grants & Contracts (current & pending)



# Planning Your Project



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Health Services

# Your Funding Needs

## Key Questions

- Program?
  - Existing or New
- Cost?
  - Amount & Frequency
- Timing?
  - Approval(s) Needed & Start Date
- Other Non-Grant Resources?



# Grant Support

## What's Your Priority?



Type	Description
General Operating	Unrestricted operating support
Program/Project	Restricted specific program/project support
Equipment	Purchase of equipment, computers, office furniture, etc.
Capacity	Development of skills and systems to build effectiveness and sustainability
Capital/Building	Capital campaigns and construction/renovation projects
Challenge	Funds dependent upon money raised from other sources
In-Kind	Products or services
Sponsorships	Special community/fundraising events, company vehicle “wraps”

# Create a Grant Team

## Find Your People

- Who's involved in grant development at your organization?

## People

### PAID

Finance, Program  
& Leadership

### UNPAID

Board, Volunteers  
& Partners

## Roles

### PROGRAM

Details & Costs

### CONNECTIONS

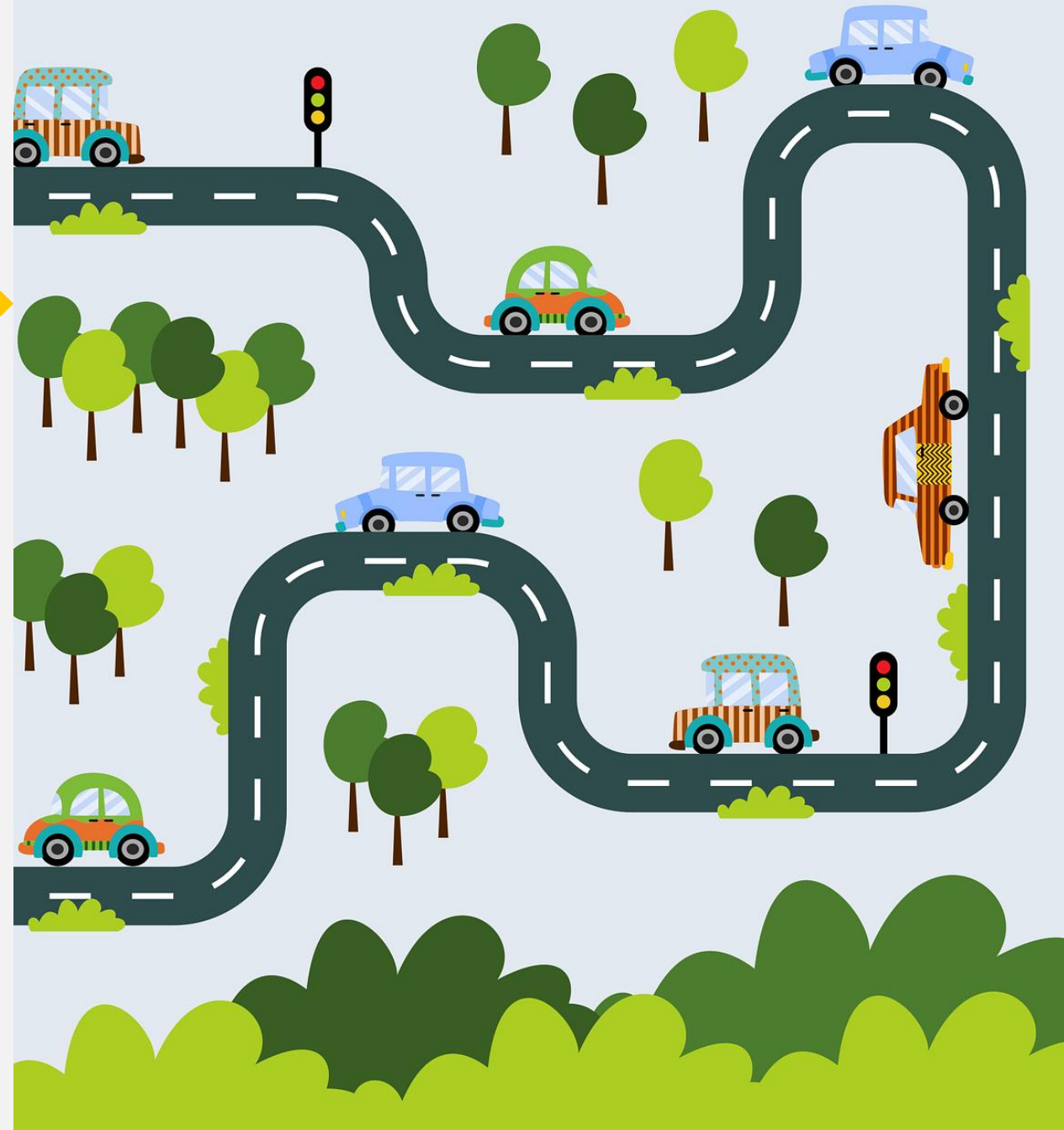
### FRESH EYES

Editing & Mock  
Review

# Program Roadmap

## Logic Model

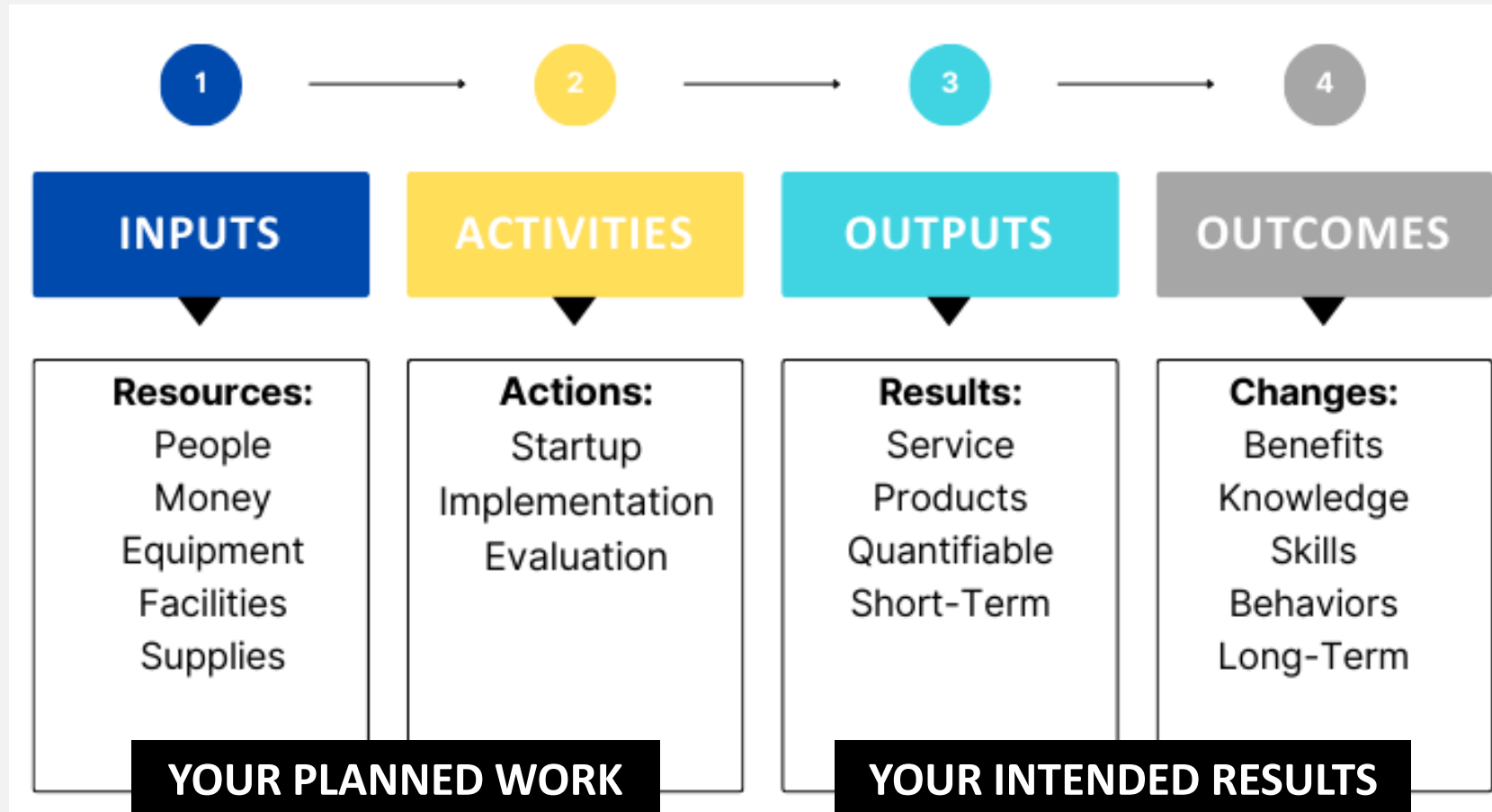
- Snapshot of your Project
- Sequence of Events
- Simple or Complex
- Program Planning
  - Budget
  - Project Narrative
  - Goals and Objectives
  - Evaluation





# Logic Model Components

## Map it Out



# Baseline Proposal

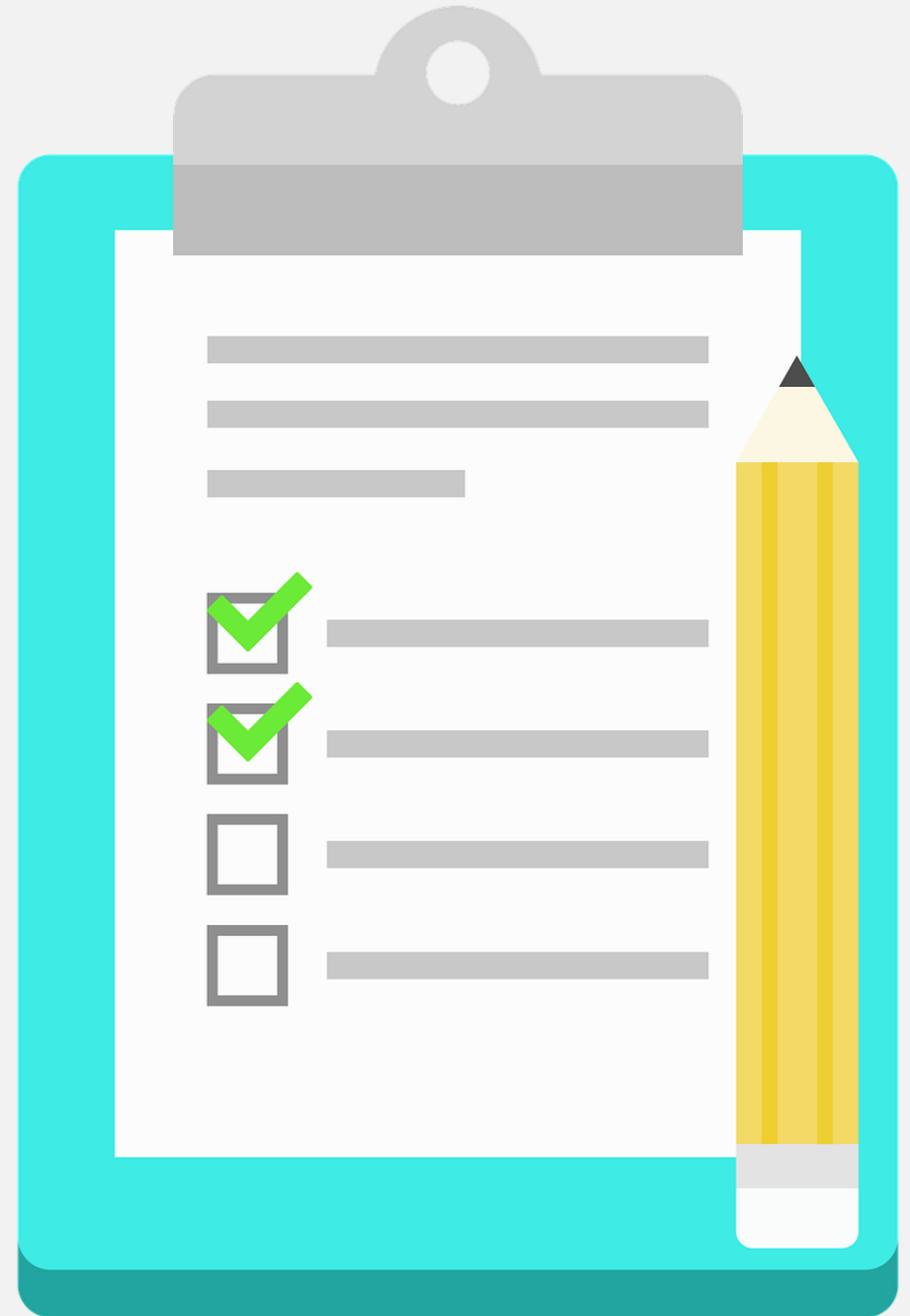
## Overview of Your Project

Term	Description
<b>Summary</b>	One-sentence overview of your program.
<b>Mission</b>	Organizational mission statement.
<b>Community Need</b>	Specific community need your program will address.
<b>Target Population</b>	Description of the beneficiaries of your program.
<b>Define Success</b>	Specific changes you want to achieve as a direct result of your work.
<b>Major Steps</b>	High-level timeline for program implementation.
<b>Partners</b>	Who will work with you to address the community problem.
<b>Evaluation</b>	Tools, data, information you can use to decide if you met your goals.
<b>Total Cost</b>	Estimated total cost.

# Checkpoint

## Progress: Grant Readiness

- Toolbox Documents
- Define Your Funding Need
- Grant Team
- Logic Model
- Baseline Proposal



# Researching Good Fit Funders



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Health and Human  
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Texas Department of State  
Health Services

# Good Fit Funders

**Be Competitive: Eligibility & Capacity**

- Geographic
- Organization Type
- Mission & Project Alignment
- Deadline
- Award
- Reporting Requirements
- Internal Systems

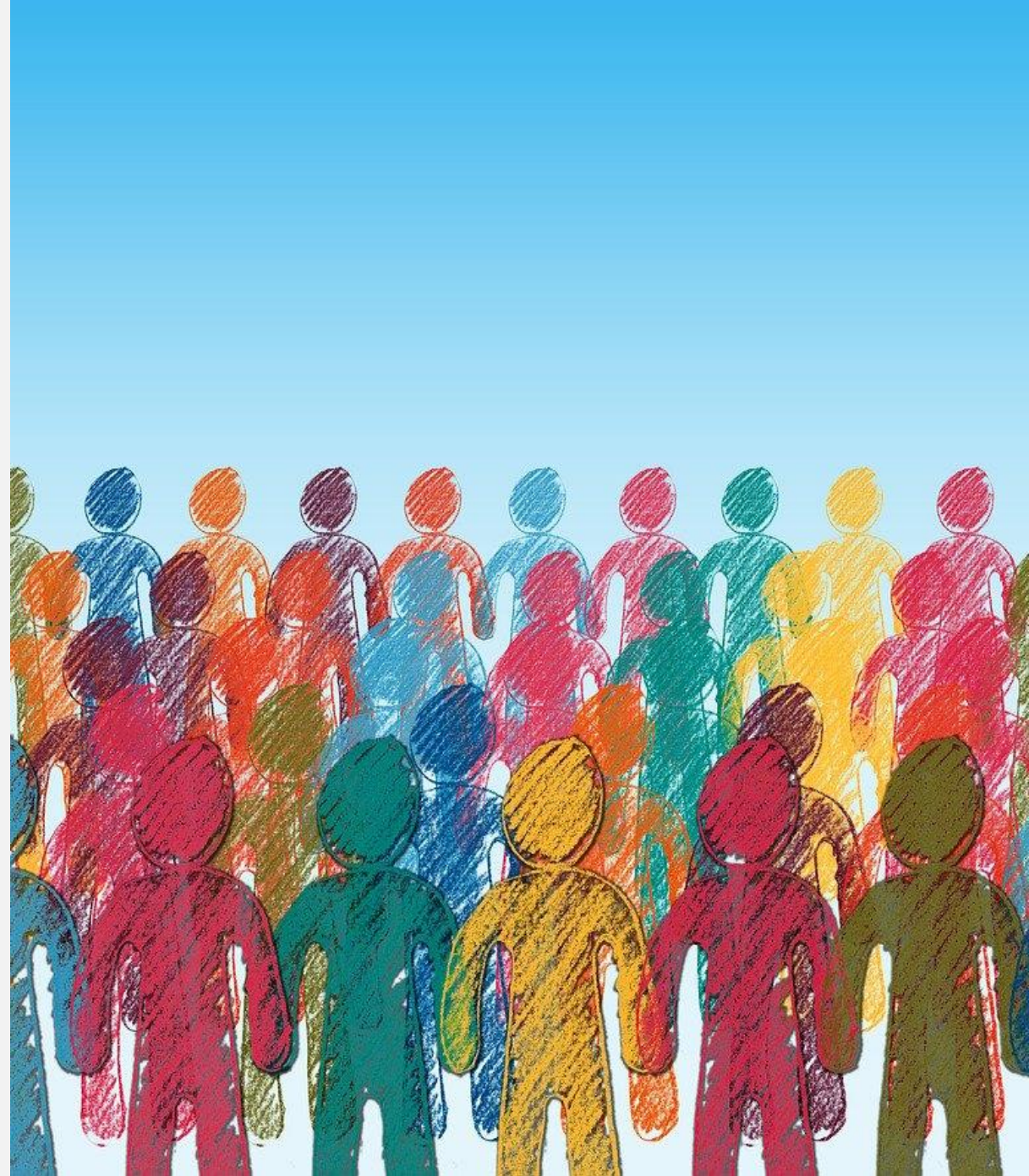




# Private Funding

## Corporations & Foundations

- Corporations
  - Grants
  - In-Kind Resources & Sponsorships
- Community Foundations
  - Specific Geography
  - Build Local Capacity
- Private Foundations
  - Income from Families & Individuals
  - Interests Vary by Donor Philosophy



# Private Funding Resources

Name	URL
Candid Funding Information Network	<a href="https://candid.org/find-us">candid.org/find-us</a> UTRGV Nonprofit Resource Center - <a href="https://utrgv.edu/nrc/services/grant-directory/">utrgv.edu/nrc/services/grant-directory/</a>
Community Foundation Locator	<a href="https://cof.org/page/community-foundation-locator">cof.org/page/community-foundation-locator</a>
DSHS Grant Development Center	<a href="https://dshs.texas.gov/grant-applications-funding/grant-development-center">dshs.texas.gov/grant-applications-funding/grant-development-center</a>
Guide Star (990s)	<a href="https://guidestar.org">guidestar.org</a>
ProPublica Nonprofit Explorer (990s)	<a href="https://projects.propublica.org/nonprofits/">projects.propublica.org/nonprofits/</a>
Subscription Databases	Many vendor options. Grant Gopher's "Lite" Membership is free. ( <a href="https://grantgopher.com">grantgopher.com</a> )
Other Nonprofit Organizations	Websites, Annual Reports, Social Media, Events

# Public Funding

Local, State & Federal Governments

- Growth & Scale
- Pre-Registration in Online Portals
- Long Applications
- Restricted Funds
- Reimbursement Model
- High levels of Compliance



# Public Funding Resources

Name	URL
Grants.gov (Federal)	<a href="https://www.grants.gov">grants.gov</a>
Texas Council for Developmental Disabilities	<a href="https://tcdd.texas.gov">tcdd.texas.gov</a>
Texas Department of Housing and Community Affairs	<a href="https://tdhca.texas.gov/notices-funding-availability-nofas">tdhca.texas.gov/notices-funding-availability-nofas</a>
Texas HHS Grants	<a href="https://hhs.texas.gov/business/grants">hhs.texas.gov/business/grants</a>
Texas Rural Funders	<a href="https://texasruralfunders.org/grant/">texasruralfunders.org/grant/</a>
Texas State Office of Rural Health	<a href="https://texasagriculture.gov/Grants-Services/Rural-Economic-Development/State-Office-of-Rural-Health">texasagriculture.gov/Grants-Services/Rural-Economic-Development/State-Office-of-Rural-Health</a>
Texas Veterans Commission	<a href="https://tvc.texas.gov/grants">tvc.texas.gov/grants</a>
County & Municipal Governments	Look for Bid Opportunities, Purchasing, etc.

# Private Funding Resources

Name	URL
Candid Funding Information Network	<a href="https://candid.org/find-us">candid.org/find-us</a> UTRGV Nonprofit Resource Center - <a href="https://utrgv.edu/nrc/services/grant-directory/">utrgv.edu/nrc/services/grant-directory/</a>
Community Foundation Locator	<a href="https://cof.org/page/community-foundation-locator">cof.org/page/community-foundation-locator</a>
DSHS Grant Development Center	<a href="https://dshs.texas.gov/grant-applications-funding/grant-development-center">dshs.texas.gov/grant-applications-funding/grant-development-center</a>
Grantmakers.io	<a href="https://grantmakers.io">grantmakers.io</a>
Guide Star (990s)	<a href="https://guidestar.org">guidestar.org</a>
ProPublica Nonprofit Explorer (990s)	<a href="https://projects.propublica.org/nonprofits/">projects.propublica.org/nonprofits/</a>
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Other Nonprofit Organizations	Websites, Annual Reports, Social Media, Events



# Decision Tracking

## Avoid the “Grant Grab”

- Standardized, Informed Decisions
- Historical Reference
- Save Time

“GO/NO GO Grant Decision Guide”

[haydayservices.com](http://haydayservices.com)

Required Attachments	Is there time to gather all required documents, such as letters of understanding (MOA, MUA, etc.)? NOTES:
Level of Evaluation	Do we have the resource capacity to complete the grant application? NOTES:
Reporting Requirements	Do we have the staff time to complete the report including program outcomes? NOTES:
Grant Cycle Frequency	Will we have another opportunity to decide not to pursue it? NOTES:
Technical Assistance	Is there a webinar and/or training available about the application? NOTES:
History with grant-making agency or foundation	Has our organization received a grant from this agency or foundation before? If so, are we in good standing with them? NOTES:

Additional Notes/Observations:

Recommendation:

### GO / NO GO Grant Decision Guide

Foundation or Agency:

Grant Name or Identifying Number, if applicable:

Deadline:

Is the deadline feasible, given the status of the program? Y N

Is the deadline feasible, given the time needed to prepare a competitive grant? Y N

Grant Award Amount or Range:

Multi-Year Grant Award? Y or N

How is the grant awarded: Reimbursement or Advanced Payment

Does the agency have the cash flow to pay for the program first and then receive grant funding? Y or N

Category	Assessment Question	Yes	No	N/A
Purpose and Area of Focus	Is there a close match between our organization's mission and experience and the funding agency's purpose for providing this grant? NOTES:			
Eligibility	Is our type of organization eligible to apply for this opportunity?			
Grant Award Amount or Range	Is the grant award sufficient to cover the entire program budget or a significant portion of it? <i>Example: A \$5,000 maximum grant for a \$5 million program is not a great fit.</i>			
Matching Requirements	Can we meet any matching funds requirements?			
Number of Grants Awarded	Is the potential grant award high enough to make our agency competitive? NOTES:			
Collaboration or partnerships	Do we have time to establish relationships, have existing relationships with required partners, or are we members of an eligible coalition? NOTES:			

# Website Review

## Do Your Homework, Part I

- Mission Statement
- Key Phrases/Words
- Application Guidelines
- Evaluation Criteria
- Giving History
- Form 990/990-PF
- Contact Information

## South Texas

- [Brownsville Community Foundation](#) - Cameron County
- [Coastal Bend Community Foundation](#) - Aransas, Bee, Jim Wells, Kleberg, Nueces, Refugio, and San Patricio Counties
- [Earl C Sams Foundation](#)
- [John G & Marie Stella Kenedy Memorial Foundation](#)
- [Knapp Community Care Foundation](#) - Cameron, Hidalgo, and Willacy Counties
- [Laredo Area Community Foundation](#) - City of Laredo
- [Raul Tijerina, Jr. Foundation](#) - Cameron, Hidalgo, Starr, and Willacy Counties
- [Rio Grande Electric Co-Op Sharing Success Grants](#) - Brewster, Crockett, Culberson, Dimmit, Edwards, El Paso, Hudspeth, Jeff Davis, Kinney, Maverick, Pecos, Presidio, Reeves, Terrell, Uvalde, Val Verde, Webb and Zavala Counties
- [Rio Grande Valley Community Foundation](#) - Hidalgo County
- [Robert J Kleberg Jr and Helen C Kleberg Foundation](#) - Brooks, Jim Wells, Kenedy, Kleberg, and Nueces Counties
- [Trull Foundation](#)
- [Valley Baptist Legacy Foundation](#) - Cameron, Hidalgo, Starr, and Willacy Counties

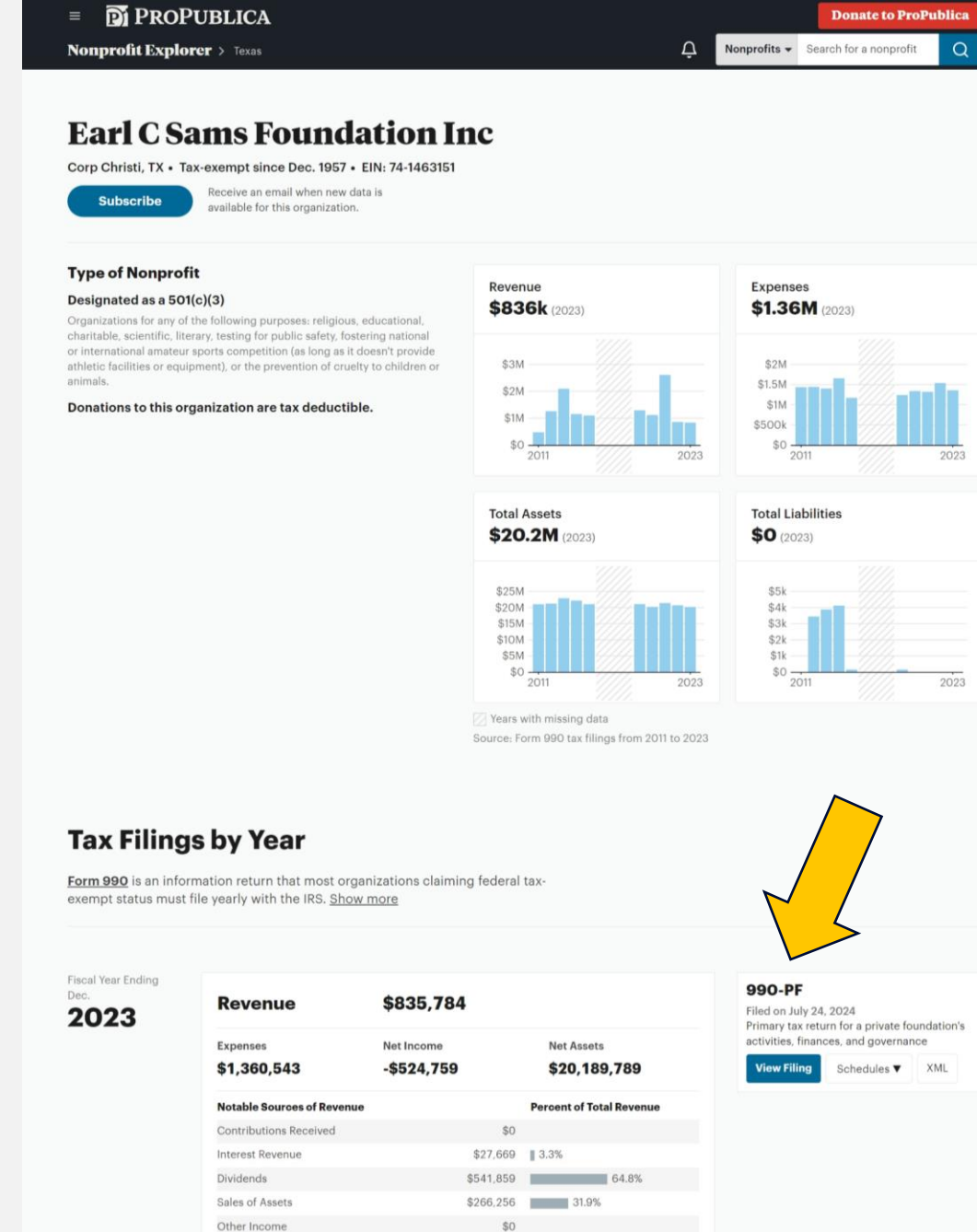
[dshs.texas.gov/grant-applications-funding/grant-development-center/funding-resources](https://dshs.texas.gov/grant-applications-funding/grant-development-center/funding-resources)

# Form 990/990-PF Review

## Do Your Homework, Part II

- Mission
- Governance and Management
- Geographic Scope
- Financial Actions
- Part VII: Officers, Directors, Etc.
- Part XIV: Supplementary Information

[projects.propublica.org/nonprofits/](https://projects.propublica.org/nonprofits/)



efile Public Visual Render

ObjectId: 202432069349100418 - Submission: 2024-07-24

TIN: 74-1463151

Form 990-PF

Department of the Treasury  
Internal Revenue Service

Return of Private Foundation  
or Section 4947(a)(1) Trust Treated as Private Foundation

Do not enter social security numbers on this form as it may be made public.  
Go to [www.irs.gov/Form990PF](https://www.irs.gov/Form990PF) for instructions and the latest information.

OMB No. 1545-0047

2023

Open to Public Inspection

For calendar year 2023, or tax year beginning 01-01-2023, and ending 12-31-2023

Name of foundation  
EARL C SAMS FOUNDATION INC  
C/O BRUCE S HAWN

Number and street (or P.O. box number if mail is not delivered to street address)  
101 N SHORELINE BLVD 500

City or town, state or province, country, and ZIP or foreign postal code  
CORPUS CHRISTI, TX 78401

A Employer identification number  
74-1463151

B Telephone number (see instructions)  
(361) 883-1871

C If exemption application is pending, check here

D 1. Foreign organizations, check here.....  
2. Foreign organizations meeting the 85% test, check here and attach computation ...

E If private foundation status was terminated under section 507(b)(1)(A), check here .....

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here .....

G Check all that apply:  
☐ Initial return  
☐ Initial return of a former public charity  
☐ Final return  
☐ Amended return  
☐ Address change  
☐ Name change

H Check type of organization:  
☒ Section 501(c)(3) exempt private foundation  
☐ Section 4947(a)(1) nonexempt charitable trust  
☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 25,177,313

J Accounting method:  
☒ Cash  
☐ Accrual  
☐ Other (specify)  
(Part I, column (d) must be on cash basis.)

Part VII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors				
1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
BRUCE S HAWN 413 UPPER CIBOLO CREEK ROAD BOERNE, TX 78006	PRESIDENT, CEO & DIRECTOR 15.00	82,065	12,310	0
SUSAN G HAWN 215 TAMERLAINE HOUSTON, TX 77024	V. P., CHAIRMAN & DIRECTOR 15.00	69,414	10,412	0
NANCY HAWN 413 UPPER CIBOLO CREEK ROAD BOERNE, TX 78006	DIRECTOR 1.00	3,900	0	0
SUSAN OHNMACHT 260 DOVER LANE MADISON, MS 39110	ASST TREASURER/SECRETARY 36.00	105,161	15,774	0
CANDACE N COUTINHO 16302 SACRE COUER SAN ANTONIO, TX 78232	DIRECTOR 1.00	3,900	0	0

Part XIV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:  
a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)  
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:  
Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions  
a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed:  
BRUCE S HAWN  
101 N SHORELINE BLVD SUITE 602  
CORPUS CHRISTI, TX 78401  
b The form in which applications should be submitted and information and materials they should include:  
APPLICATION AND GUIDELINES ARE AVAILABLE ON THE FOUNDATION'S WEB SITE OR BY MAILING REQUESTS TO FOUNDATION OFFICE.  
c Any submission deadlines:  
30 DAYS PRIOR TO BOD MEETINGS, WHICH GENERALLY ARE THE LAST WEEK OF MARCH, JUNE AND NOVEMBER.  
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:  
DISTRIBUTIONS ARE MADE ONLY TO TAX EXEMPT ORGANIZATIONS, PRIMARILY IN THE SOUTH TEXAS AREA.

Part XIV Supplementary Information (continued)				
3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a Paid during the year				
1 HOPE FOR KIDS 1150 W IH 10 STE 255 SAN ANTONIO, TX 78230	NONE	PUBLIC	GENERAL OPERATING SUPPORT	10,000
AGAPE HARBOR 5151 FLYNN PARKWAY SUITE 106 CORPUS CHRISTI, TX 78411	NONE	PUBLIC	GENERAL OPERATING SUPPORT	10,000
BAND PARENTS WINSTON CHURCHILL HIGH SCHOOL 12049 BLANCO ROAD SAN ANTONIO, TX 78247	NONE	PUBLIC	GENERAL OPERATING SUPPORT	10,000
AGAPE RANCH 5151 FLYNN PARKWAY SUITE 105 CORPUS CHRISTI, TX 78411	NONE	PUBLIC	GENERAL OPERATING SUPPORT	10,000
ART CENTER OF CORPUS CHRISTI 100 N SHORELINE BLVD CORPUS CHRISTI, TX 78401	NONE	PUBLIC	GENERAL OPERATING SUPPORT	5,000

# Grant Calendar

## Planning Ahead

- Visible, Monthly Calendar
- Deadlines
- Priorities
- Review Calendar as a Team
- Other Events & Vacations

**JAN 25**

**FEB 25**

**MAR 25**

**Funder A  
LOI (1.30)**

**Annual  
Gala  
(2.15)**

**Spring  
Break  
Week**

**Funder B  
Proposal  
(Rolling)**

**ABC Grant  
Final  
Report  
(2.28)**

**Funder A  
Full  
Proposal  
(3.31)**



# Final Thoughts

- Grant development is 80% planning.
- Grant readiness doesn't happen overnight.
- Research grants year-round: document your decisions and maintain a grant calendar.
- Keep trying!



# Q&A

## Grants Education and Nonprofit Management Resources

### Professional Development

Websites that provide skills development opportunities for new and experienced grant-seekers.

**DSHS Grant Development Center Trainings**

**Grant Proposal Samples**

**Podcasts**

The slides will be posted here by next Monday!

[dshs.texas.gov/grant-applications-funding/grant-development-center/grantsmanship-and-nonprofit-management-resources](https://dshs.texas.gov/grant-applications-funding/grant-development-center/grantsmanship-and-nonprofit-management-resources)



**TEXAS**  
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# Thank you!

## Get Ready for Grant Success

[grantcenter@dshs.texas.gov](mailto:grantcenter@dshs.texas.gov)

[dshs.texas.gov/grant-applications-funding/grant-development-center](https://dshs.texas.gov/grant-applications-funding/grant-development-center)