DNA

DATA
NEEDS
ACTION

Grant & Resource
Development Workbook

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DNA Grant & Resource Development Workbook

Designed for Educators, School Leaders, and Community Organizations

Powered by the DNA Blueprint

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Personal Portfolio

Grant & Resource Development Impact

$100+ Million Secured Since 1999

Federal • State • Foundation • Corporate • In-Kind Partnerships

More than two decades of successful grant writing, implementation, compliance oversight, and systems-level execution.

What This Means for You

This workbook is grounded in real-world execution. Strategies taught here have been applied, funded, implemented, and sustained.

Funding Portfolio Snapshot

Federal Formula & Entitlement Funding

- Title II – Professional Development
- Title IV – Student Support & Academic Enrichment
- Perkins V – Career & Technical Education
- E-Rate Technology Infrastructure

Federal & National Competitive Grants

- 21st Century Community Learning Centers
- National Tech Prep Demonstration Grant
- School Climate Transformation Grant
- Public & State Charter School Grants
- Project Lead the Way STEM Grant
- Ripple Effects Behavioral Intervention Funding
- Michael Baisden Million Mentors Grant

Workforce & Economic Development

- Workforce Innovation Funds
- Education & Economic Development Grants
- EZ Empowerment Zone Grant
- Farm Up USA Grant
- Summer Work Opportunity Program
- City of Columbia Community Resources

Corporate & Industry Partnerships

- BMW & Diamond Chrysler Vehicle Donations
- Mack Truck Company Program
- Siemens Machine Tool Classroom Donation
- Enviro Ag Futures Lab & Grounds Development
- Industry Workforce Partnerships

Systems Impact Delivered

- Career & Technical Education Expansion
- Charter School Implementation
- Community & Industry Alignment
- Leadership Development Systems

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Introduction

This workbook equips educators, leaders, and nonprofits with a practical roadmap to secure and sustain funding. With shifts in the federal landscape, including reduced DOE budgets, successful resource development requires diversification: federal, state, private, sponsorships, and community-based support. The framework builds on more than $100 million in grants and resources secured since 1999.

Section 1 – Data
This section helps you build the case for funding. It emphasizes collecting, organizing, and presenting data to clearly demonstrate need.

Problem Statement Worksheet
Issue Description | Data & Statistics | Impact Statement

Section 2 – Needs
This section identifies gaps, opportunities, and specific needs, connecting data with real-world challenges.

Team Roles Matrix
Team Member | Role | Responsibilities | Due Date

Section 3 – Action
Design and implement programs with practical tools that move from planning to execution.

Grant Fit Scoring Rubric
Grant | Deadline | Alignment Score (1–5) | Notes

Budget Template
Category | Item | Cost | Justification (Personnel, Supplies)

Section 4 – Sustainability
Plan for long-term success through sustainability planning and diversified revenue.

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KPI Tracker Table (Example)
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DNA Grant & Resource Development

Grant funding and resource development is not about chasing money. It is about building systems that attract investment because your mission is clear, measurable, and aligned with demonstrated need.

With more than **$100 million secured and implemented since 1999**, this framework transforms strategic vision into funded execution.

The DNA Framework

Data – Establish credible evidence.
Needs – Define the gap with clarity.
Action – Design measurable solutions.

Sustainability is built in.

What You Will Gain

A Defensible Problem Statement

A Focused 90-Day **Roadmap**

SMART Objectives Tied to KPIs

A Sustainability Strategy

Funding supports the mission . . . Systems sustain it.

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DNA Grant & Resource Development Workbook

(Data → Needs → Action → Sustainability)

I. Introduction

This workbook turns your priorities into a **fundable plan** using the DNA-S framework. You'll leave with a data-backed problem statement, a short list of matched funders, a 90-day action plan, and a one-page sustainability map.

Three example programs to model your work

- **The Beast School Climate System** — a whole-school SEL + climate model that improves the ABCs: **Achievement, Behavior, Climate** through daily routines, read-aloud, and family engagement.
- **The Brotherhood** — Male mentoring & character de that boosts attendance and core achievement while reducing behavior incidents.
- **Vets Build USA** — veterans' housing + workforce pathway producing code-compliant homes, stackable credentials, and living-wage placements.

Use whichever example (or a blend) mirrors your program as you complete the fill-ins.

🔴 Section 1 — DATA (prove the need)

Problem Statement Worksheet

Issue Description	3–5 Key Data Points (dated & sourced)	Impact Statement

Baseline → Target Table

KPI	Baseline	Target	Timeline	Responsible	Evidence/Tool
The Beast: Daily attendance					SIS

KPI	Baseline	Target	Timeline	Responsible	Evidence/Tool
The Beast: Office referrals / suspensions					Discipline logs
The Brotherhood: ELA/Math proficiency					State tests
Brotherhood: GPA / on track to graduate					Transcript
VBUSA: Credentials earned					LMS/rosters
VBUSA: Inspection pass rate					Permit system

🟡 **Section 2 — NEEDS (turn gaps into fundable priorities)**

Needs Prioritization (score 1–5)

Need Severity Solvability Funder Fit Equity Impact Total

Team Roles

🔵 **Section 3 — ACTION (design a fundable program)**

Mini Logic Model

Inputs	Activities	Outputs	Outcomes (6–18 mo)
Staff, mentors, curriculum, sites	PD, SEL routines, builds, family classes	# served; sessions;	↑ proficiency/wages; ↓ incidents; ↑ attendance/credentials

SMART Objectives

Objective Measure Target Date Owner

Grant Fit Rubric (100 pts)

Funder	Alignment (40)	Eligibility (20)	Capacity (20)	Competitiveness (20)	Total	Go/No-Go

⚠️ **Follow-the-Funder Rule (critical)**

Give the grantor exactly what they ask for—in the exact format required. Mirror RFP headings and limits, use their portal forms, attach every required document, and outline to their scoring rubric.

Submission Checklist: ☐ correct forms ☐ page limits ☐ file names ☐ signatures ☐ budget math ☐ attachments ☐ proofread PDF

🟢 **Section 4 — SUSTAINABILITY**

Engines

- **Financial engine:** fee-for-service placements, employer sponsorships, apprenticeship reimbursements; small revolving bridge fund.
- **Housing engine (VBUSA):** reinvest mortgage proceeds/repayments and net into future builds; targeted rehabs stabilize neighborhoods.
- **Program engine (Beast/Brotherhood):** train-the-trainer, fidelity checks, curriculum refresh; succession for key roles.
- **Partnership engine:** MOUs with districts, colleges, workforce boards, Habitat/affiliates, municipalities; annual review.

Notes:

Revenue Mix Planner

Source	Yr 1	Yr 2	Yr 3	Notes
Federal/State (Title, WIOA, CDBG)				
Foundations/Corporate/Sponsors				
Earned (PD, consulting, fees)				
Mortgage/Reinvestment (VBUSA)				

Notes:

Quick Example KPIs

The Beast (Elementary Climate)

- Attendance ≥94%
- Office referrals −30%; out-of-school suspensions −40%
- SEL survey +10 pts; K–3 reading +6 scale points

The Brotherhood (Secondary)

- ELA +7 pts; Math +6 pts
- On track to graduate +12%
- Family workshops: 4/semester

Vets Build USA (Community)

- 90% earn OSHA-10 + 2 craft modules
- 12–15 homes/rehabs; ≥90% inspection re-pass
- ≥60% placement at ≥$22/hr within 90 days

Working Prompts:

- One-paragraph **case for support**:

- Top 3 funders & why (use rubric):

- 90-day action plan (tasks, owners, dates):

Keep this workbook as your live grant plan—and remember **follow the funder rules** every time.

📊 II. The KPI Tracker

KPI = Key Performance Indicator.
It's a tool to **measure whether your program is achieving its goals**. In grant writing, funders expect you to track progress with data, not just activities.

A **KPI Tracker**:

- Defines **what you're measuring** (e.g., attendance, reading scores).
- Shows **baseline vs. target** performance.
- Identifies **who is responsible**.
- Keeps everyone accountable and provides **evidence for reports**.

📝 KPI Tracker Table (Example)

KPI	Baseline	Target	Timeline	Responsible Person	Status/Notes
Student daily attendance	85%	92%	By May 2026	Principal	
Reading proficiency (ELA)	42%	60%	By June 2026	Literacy Coach	
Teacher SEL training rate	50%	100%	By March 2026	PD Coordinator	
Parent engagement events	3/year	6/year	By July 2026	Family Liaison	

How to Use

1. Start with **3–5 measurable KPIs** aligned to the grant.
2. Fill in baseline numbers using **data you already have**.
3. Set realistic but ambitious **targets**.
4. Assign **responsibility** so accountability is clear.
5. Update status/notes quarterly to track progress.

KPI	Data	Targets	Owner	Deadline

Notes:

📊 III. The A.C.E. 12 Step Blueprint

Every step of the 12-Step Grant Writing Blueprint must demonstrate **A.C.E.:**

- **A – Alignment** → Connect the step to funder priorities and program mission.
- **C – Clarity** → Define the purpose, roles, or outcomes clearly.
- **E – Evidence** → Provide data, proof, or justification to support the step.

📝 A.C.E. Checklist by Step

Step	A – Alignment	C – Clarity	E – Evidence
1. Build a team	Match expertise to funder expectations	Define roles & responsibilities	Highlight staff qualifications
2. Clarify needs	Connect needs to funder's mission	State the problem clearly	Use needs assessment data
3. Collect data	Show relevance to funder's focus areas	Establish baseline metrics	Use credible data sources
4. Identify funders	Ensure program–funder fit	Clarify funding categories	Research funder track record
5. Define goals	Align goals with required outcomes	Articulate broad outcomes	Support with performance data
6. Set objectives	Reflect funder's measurable criteria	Make objectives SMART	Link to evidence-based strategies
7. Create evaluation framework	Align with funder reporting needs	Clarify evaluation questions	Choose valid tools/methods
8. Draft management plan	Match funder compliance expectations	Define implementation roles	Document past management success
9. Plan for sustainability	Fit funder's sustainability requirements	Show long-term strategy	Provide partnerships or cost-sharing
10. Develop	Follow funder cost	Categorize costs	Justify expenses

Step	A – Alignment	C – Clarity	E – Evidence
budget	guidelines	clearly	with data
11. Proof and format	Meet compliance and submission rules	Clarify structure & flow	Verify references and accuracy
12. Submission	Align with funder deadlines/process	Submit on time and correctly	Ensure attachments/data are accurate

✨ How to Use A.C.E.

- As a **proposal development checklist** → verify every step has Alignment, Clarity, and Evidence.
- As a **team-teaching tool** → keep participants focused on funder-centered thinking.
- As a **quality control system** → ensures your team never misses the three essentials of winning grants.

It's the **storyline** in your grant proposal where you:

1. **Define the challenge** clearly (the villain/problem).
2. **Position your program as the hero** — not just another project, but *the* solution.
3. **Show what makes your approach unique** (why funders should trust YOU to deliver results).
4. **Demonstrate credibility** through evidence, past success, or innovation.

📝 IV. How to Write It (DNA Framework Example)

1. Problem/Villain:
"Across our district, students face persistent literacy gaps, with reading scores 20 points below the state average. Traditional interventions have failed to close these gaps."

2. Hero/Your Program:
"Our *DNA Grant Model* combines data-driven decision-making, daily SEL routines, and collaborative leadership. This approach has already driven 20% annual gains in reading/ELA in high-need schools."

3. Why You're Unique:
"Unlike one-size-fits-all programs, we use the **DNA Framework (Data → Needs → Action → Sustainability)** to tailor interventions. We integrate academic rigor with climate and SEL practices — an evidence-based blend not found in typical literacy programs."

4. Proof of Success (Credibility):
"With more than $100M in funded projects since 1999, and documented districtwide gains, our model consistently delivers measurable results that sustain beyond the grant cycle."

5. Call to Action:
"By investing in this program, funders become part of a proven solution that doesn't just improve test scores but transforms school culture and long-term student success."

Why This Works

- It frames the **problem as urgent**.
- It frames **your program as the proven hero** with unique methods.
- It reassures funders with **credibility and evidence**.
- It gives funders a **chance to be part of the hero's journey**.

Notes:

V. Sample Grants Action Plan (GAP)

(12 Month Calander Jan 2026 – Sept 2026)

January 2026

Chick-fil-A True Inspiration Awards

- **Deadline:** Early January (Nomination process begins Fall 2025)
- **Description:** Competitive corporate giving focused on youth & education.
- **Eligibility:** Nonprofits; requires local Chick-fil-A operator nomination.
- **Funding:** $30k–$350k.
- **Action:** Build relationship with Atlanta franchise operators in Q4 2025.

February 2026

The Coca-Cola Foundation (Atlanta)

- **Deadline:** Rolling reviewed quarterly.
- **Description:** Focus on youth development, civic engagement, and education.
- **Eligibility:** 501(c)(3) nonprofits, Atlanta-based preferred.
- **Funding:** $50k–$500k typical.
- **Action:** Frame organization as "hometown impact" aligned with Atlanta youth outcomes.

March 2026

Arthur M. Blank Family Foundation

- **Deadline:** Early Spring cycle.
- **Description:** Youth development, Falcons Youth Fund (sports/health).

- **Eligibility:** Nonprofits serving Atlanta youth.
- **Funding:** $25k–$250k.
- **Action:** Build case around physical activity, mentoring, and community presence.

April 2026

Community Foundation for Greater Atlanta

- **Deadline:** Spring RFP (annual).
- **Description:** Community impact grants—child & family well-being focus.
- **Eligibility:** Atlanta-area nonprofits.
- **Funding:** $50k–$100k.
- **Action:** Prep strong data-driven case tied to the organization's mentoring impact in GA zip codes.

May 2026

United Way of Greater Atlanta

- **Deadline:** Varies (rolling RFPs).
- **Description:** Child & family well-being, youth mentoring.
- **Eligibility:** Nonprofits with FLUXX profile.
- **Funding:** $50k–$250k.
- **Action:** Create profile in FLUXX system; monitor new RFPs monthly.

June 2026

UPS Foundation (Atlanta-based)

- **Deadline:** Rolling.
- **Description:** Equity, economic empowerment, youth mentoring, workforce prep.

- **Eligibility:** Nonprofits in Atlanta metro.
- **Funding:** $25k–$100k typical.
- **Action:** Begin relationship-building with UPS Foundation program officers.

July 2026

Georgia Power Foundation

- **Deadline:** Rolling, with summer funding cycle.
- **Description:** Workforce, education, and mentoring partnerships.
- **Eligibility:** Schools, nonprofits, CBOs.
- **Funding:** $10k–$75k typical.
- **Action:** Align organizations mentoring to workforce readiness outcomes for teens.

August 2026

GA DFCS – Prevention & Community Support

- **Deadline:** FY26 RFA expected late Summer.
- **Description:** Prevention supports for youth & families, complements mentoring.
- **Eligibility:** Community-based nonprofits.
- **Funding:** $100k–$250k typical.
- **Action:** Watch Submittable portal for opening; prep family support alignment.

September 2026

MENTOR Georgia / National

- **Deadline:** Ongoing TA/support.
- **Description:** Training, TA, ecosystem connections; used to strengthen federal grant applications.
- **Eligibility:** GA mentoring orgs.
- **Funding:** Not direct but enhances competitiveness.
- **Action:** Secure TA and letters of support for next OJJDP cycle.

With this sample12-month calendar, organizations can **sequence applications, align partnerships, and build capacity** while balancing federal, state, and philanthropic opportunities.

VI. Interactive Worksheets

- Problem Definition: Issue description, data, impact statement
- Team Roles & Collaboration Plan: Responsibility matrix + communication channels
- Grant Fit Checklist: Score and rank opportunities
- Budget Templates: Personnel, supplies, equipment, justification
- Sustainability Plan: Post-grant funding sources & strategies

Grant Writing Worksheets — Fillable Workbook

Type directly in the fields, check the boxes, and add rows as needed.

Worksheet 1: Problem Definition

1) Issue Description: Briefly describe the problem or challenge the district is facing:

_____
_____
_____
_____

- *Provide a clear and concise description of the issue.*
- *Include relevant context to help the team understand the problem.*

2) Data and Statistics: Provide relevant data and statistics supporting the urgency of the issue:

_____
_____
_____
_____

- *Collect and present data that quantifies the impact of the problem.*
- *Use charts or graphs to enhance clarity.*

3) Impact Statement: Articulate the potential impact on students, staff, and the community:

_____
_____
_____
_____

• Clearly express how the issue affects various stakeholders.
• Highlight the consequences of not addressing the problem.

Worksheet 2: Team Member Roles and Responsibilities

1) Team Members: List the key members of the grant writing team and their roles.

Name	Role/Expertise	Email	Phone

• Identify individuals with diverse skills and expertise.
• Clearly define each team member's role.

2) Responsibilities: Specify responsibilities for each team member during the process.

Team Member	Responsibility	Due Date	Complete ☐

• Assign tasks based on team members' strengths.
• Establish deadlines and expectations for each responsibility.

Worksheet 3: Collaboration Plan

1) Communication Channels: Specify preferred channels (e.g., meetings, emails, collaboration tools).

Channel	Purpose/Use	Owner	Notes

- *Choose communication methods that suit the team's preferences.*
- *Establish protocols for urgent and non-urgent communications.*

2) Meeting Schedule: Outline the schedule for team meetings throughout the process.

Cadence	Day/Time	Lead	Agenda Notes

- *Set regular meeting times to ensure consistent collaboration.*
- *Allow flexibility for additional meetings as needed.*

Worksheet 4: Objectives Clarification

1) Goals and Objectives: Clearly articulate the goals and objectives of the grant proposal (SMART).

Objective (SMART)	Measure	Target Date	Owner

• *Ensure objectives are specific, measurable, achievable, relevant, and time-bound (SMART).*
• *Align objectives with the identified needs from the needs assessment.*

2) Alignment with Needs Assessment: Demonstrate how objectives align with identified needs.
Narrative:

_____
_____
_____
_____

• *Explain the connection between objectives and identified needs.*
• *Highlight how achieving objectives will address the identified challenges.*

Worksheet 5: Grant Research Checklist

1) Grant Opportunities: List potential grants with eligibility, deadlines, and requirements.

Funder/Program	Eligibility	Deadline	Amount/Duration	Key Requirements

• *Research grants relevant to the district's objectives.*
• *Include size and funding duration information.*

Notes:

2) Grant Fit Analysis: Evaluate each grant's alignment to your objectives.

Grant	Fit Score (1–5)	Pros	Risks/Constraints	Decision

- *Create a scoring system to assess fit objectively.*
- *Consider impact, competitiveness, and requirements.*

Worksheet 6: Proposal Structure

1) Introduction: Provide a template for the introduction section of the grant proposal.

Introduction draft:

_____
_____
_____

- *Craft an engaging introduction that captures attention.*
- *Clearly state the purpose and significance of the project.*

2) Problem Statement: Guide the development of a compelling problem statement.
Problem Statement draft:

_____
_____
_____
_____

- *Clearly define the problem and its significance.*
- *Use data and anecdotes to make the problem relatable.*

3) Objectives and Methods: Structure for outlining objectives and methods.

Objective	Methods/Strategies	Timeline	Owner

• *State objectives using SMART criteria.*
• *Detail the methods and strategies to achieve each objective*

Worksheet 7: Narrative Development Tips

1) Innovation Highlight: Tips on emphasizing innovation in the project.
What makes our approach innovative?

_____
_____
_____
_____
_____

• *Identify unique aspects that set the project apart.*
• *Show how the project addresses challenges in a novel way.*

2) Impact Statement: Guidance on creating a powerful impact statement.
Expected positive outcomes (qualitative & quantitative):

_____
_____
_____
_____
_____

• *Articulate expected outcomes.*
• *Support with qualitative and quantitative data.*

Worksheet 8: Budget Categories Template

1) Personnel: Template for detailing personnel-related budget items.

Position/Role	FTE/Hours	Rate	Cost	Notes

• *List all personnel involved and their costs.*
• *Include salaries, benefits, and additional expenses.*

2) Supplies and Equipment: Template for specifying supplies and equipment budget.

Item	Qty	Unit Cost	Total	Notes

• *List all necessary supplies and equipment.*
• *Include cost estimates for each item.*

Worksheet 9: Budget Justification Guide

1) Alignment with Objectives: Justify budget items in alignment with project objectives.
Budget justification narrative:

_____
_____
_____
_____

• *Explain how each budget item contributes to objectives.*
• *Emphasize cost-effectiveness.*

2) Expected Outcomes: Connect budget items to expected outcomes. How the budget ensures successful implementation:

_____

_____

_____

• *Link budget items to anticipated outcomes and impact.*
• *Show how funds will be managed responsibly.*

Worksheet 10: Action Plan Template

1) Timelines and Milestones: Develop timelines and milestones for implementation.

Milestone	Start	Finish	Responsible	Status

• *Create a detailed timeline with key milestones.*
• *Assign specific dates and responsibilities.*

2) Responsibility Matrix: Assign responsibilities during implementation.

Task	Owner	Due Date	Dependencies	Complete

• *Define roles and responsibilities for each team member.*
• *Ensure accountability by assigning tasks to individuals.*

Worksheet 11: Monitoring and Evaluation Plan

1) Key Performance Indicators (KPIs): Identify KPIs for monitoring progress.

KPI	Baseline	Target	Data Source	Frequency

• *Select KPIs aligned with objectives and success criteria.*
• *Define measurable targets for each KPI.*

2) Assessment Methods: Select appropriate assessment methods.

Method/Tool	Qual/Quant	Interval	Owner	Notes

• *Choose methods that align with goals.*
• *Include both qualitative and quantitative measures.*

Notes:

Worksheet 12: Sustainability Plan Template

1) Post-Grant Funding Sources: Identify potential funding sources after the grant period.

Source	Type (Gov/Private/Community)	Amount/Term	Likelihood	Next Step

• *List potential sources beyond the grant period.*
• *Consider governmental, private, and community-based options.*

2) Ongoing Strategies: Develop strategies to sustain outcomes.
Sustainability strategies (engagement, partnerships, capacity building):

_____
_____
_____
_____
_____

• *Outline strategies for maintaining impact after grant funds end.*
• *Include community engagement, partnerships, and capacity building.*

Notes:

VII. Beyond Grants: Sponsorships & Resource Development

Explore diversified funding strategies:
- Corporate Sponsorships: Approaching local businesses and national brands
- Individual Donors: Using storytelling to drive giving
- Events & Campaigns: Fundraising Dinners, Golf Tournaments, Crowdfunding
- Community Partnerships: In-kind support, vendors, pooled resources

[Sample Sponsorship Request Letter]
[Donor Tracking Worksheet]

Sample Sponsorship Request Letter
Dear [Sponsor/Donor],

We are reaching out to invite you to partner with us in supporting [project/cause]. Your sponsorship will help us expand opportunities for students and communities. In recognition, we will [acknowledge sponsor benefits].

Thank you for considering this impactful investment.

Sincerely,
[Your Organization]

VIII. The DNA Blueprint: 12-Step Starter Guide to a 501(c)(3)

The DNA Blueprint is a practical, fillable roadmap that takes a founder or board from idea to a grant-ready, IRS-compliant nonprofit. Built around **12 plain-steps**, the guide translates IRS expectations into action items you can complete in real time.

Who it's for: new founders, organizing boards, fiscal-sponsor graduates, and program leaders spinning out a charitable project. The guide aligns your formation process with **grant readiness**, ensuring your story, budget, outcomes, and controls meet both funder standards and IRS rules.

How to use the guide:

- Move step-by-step; assign an **owner** and **due date** for each deliverable.
- Apply the **A.C.E. lens** continuously—**Alignment** to charitable purpose and funder priorities, **Clarity** of roles/outcomes, and **Evidence** (data, policies, budgets) to prove feasibility.
- Park legal questions for counsel/CPA while you complete the fill-ins and gather attachments.

By the end, you will have a **Form 1023/1023-EZ–ready packet** and a launch plan, including:

- Mission & impact thesis; name/brand checks.
- Articles (with required purpose/dissolution clauses), bylaws, first board minutes, and core policies.
- EIN, banking, internal controls; 3-year budget and **Narrative of Activities**.
- State charity registration plan; 90-day fundraising calendar; donor receipting; compliance calendar.

Note: This workbook is educational and does not replace legal or tax advice. Use it to organize your documents and decisions so your attorney/CPA can review and file efficiently.

1) Purpose & Impact Statement

Why it matters: IRS approval and funders both start with purpose.

Key actions: Define charitable purpose (education, relief of the poor, etc.); craft a one-sentence mission and a simple theory of change.

Deliverables: Mission statement; 100-word case for support.

_____
_____
_____
_____
_____
_____

Fill-ins:

- Mission: _____

- Primary beneficiaries: _____

- Measurable change in 12–18 months:

  _____

2) Name, Brand & Availability

Why it matters: A unique name avoids filing delays and signals credibility.

Key actions: Check state name availability; secure domain/social handles; draft a tagline.

Deliverables: Name reservation/confirmation; tagline; brand starter kit.

Fill-ins:

- Legal name (proposed): _____

- Tagline (≤ 8 words): _____

- Domain/handles reserved: _____

3) Incorporate (Articles of Incorporation)

Why it matters: You need a state nonprofit corporation before IRS exemption.

Key actions: File Articles including the **501(c)(3) purpose** and **dissolution** clauses; list a **registered agent** and principal office.

Deliverables: Filed Articles + receipt; registered agent agreement.

Fill-ins:

- State of incorporation: _____

- Registered agent: _____

- Date filed: _____ Document #/Receipt: _____

4) Governing Team & Bylaws

Why it matters: **The IRS looks for independent, functioning governance.**

Key actions: **Recruit an initial board (3–7 common); adopt bylaws; approve core policies:** Conflict-of-Interest, Fiscal Controls, Record Retention, Whistleblower, Gift Acceptance**.**

Deliverables: **Signed bylaws; first board minutes; policy set.**

Fill-ins:

- Directors (name/role):

  _____

- Bylaws adopted on: _____ Quorum rule: _____

5) EIN, Banking & Basic Finance

Why it matters: **You'll need an EIN to bank, hire, and apply for exemption.**

Key actions: **Apply for** EIN **(IRS); open bank account; select** cash **or** accrual **basis; set dual signature & spending thresholds.**

Deliverables: **EIN letter; bank resolution; finance SOP.**

Fill-ins:

- EIN: _____ Bank: _____
- FY-end (MM/DD): _____
- Accounting method: ☐ Cash ☐ Accrual Software: _____

6) Programs, Outcomes & Evaluation (Logic Model)

Why it matters: **Funders and the IRS expect feasible, charitable activities.**

Key actions: **List programs; define outputs/outcomes and simple measures; set equity & access principles.**

Deliverables: **1-page logic model; annual workplan.**

Fill-ins:

- Program #1 + key output:

  _____

- Outcome metric(s):

  _____

7) Start-Up Budget & 3-Year Forecast

Why it matters: **The IRS requires financial projections; funders want realism.**

Key actions: **Build expense/revenue projections (Y1–Y3); include contingency (10–15%); align with programs.**

Deliverables: **3-year budget; board-approved Y1 operating budget.**

Fill-ins:

- Y1 revenue total: $_____   Y1 expense total: $_____
- Top 3 revenue sources (percent):

  _____

8) IRS Exemption Strategy (Form 1023-EZ vs. 1023)

Why it matters: **Picking the right pathway saves time and rework.**

Key Actions:

EZ quick screen (≤ $50k projected receipts for each of next 3 years and ≤ $250k assets; not a church/school/hospital/supporting org/LLC); otherwise use the full Form 1023 **on** Pay.gov**.**

Prepare Narrative of Activities**, budgets, organizing docs, and board roster.**

Notes:

Deliverables: Submitted 1023-EZ or 1023; Pay.gov receipt.

- Filing path: ☐ 1023-EZ ☐ 1023 Filed on: _____ Fee: $_____

- Narrative drafted: ☐ Yes Attachments ready: ☐ Articles ☐ Bylaws ☐ Policies ☐ Budget

Compliance cues: No private inurement/excess benefit; limited lobbying; no political campaign activity. "Testing for public safety" orgs are 501(c)(3) but **donations aren't deductible**; amateur-sports orgs must meet special rules.

9) State Charity Registration & Tax Exemptions

Why it matters: Many states require registration before fundraising.

Key actions: Register with state charity bureau (AG/SOS); secure sales/use tax exemptions where available; confirm any local licenses.

10) Fundraising Launch & Donor Systems (First 6–12 Months)

Why it matters: Early revenue validates the model and sustains operations.

Key actions: Build a 90-day plan (individual giving, grants, CSR, events); set up CRM/spreadsheet; create receipts & **$250+** acknowledgment letters; publish a simple case statement.

Notes:

Deliverables: 90-day outreach calendar; top 10 prospects list; receipt template.

Top 10 prospects:

1:

2:

3:

4:

5:

6:

7:

8:

9:

10:

First campaign goal & deadline: $_____ by _____

Notes:

11) Records, Controls & Risk

Why it matters: Good controls protect the mission and satisfy auditors/funders.

Key actions: Create a **Document Locker** (Articles, bylaws, EIN, minutes, policies, bank docs, grants, receipts); implement two-person cash handling; adopt cloud backups; set insurance (D&O, GL) and data-privacy basics.

Deliverables: Document index; insurance binder; control checklist.

Fill-ins:

- Storage location/links:

  _____

- Policies last reviewed on: _____ Next review: _____

12) Governance in Motion: Calendars & Reporting

Why it matters: Staying compliant builds credibility and keeps status.

Key actions: Build an annual board calendar; file **IRS Form 990/990-EZ/990-N** (15th day of the 5th month after FY-end); renew state registrations; conduct annual COI disclosures; publish an impact update.

Deliverables: Annual compliance calendar; board self-assessment; public impact brief.

- 990 due date: _____ Preparer: _____
- Board meetings (dates): Q1 _____ Q2 _____ Q3 _____ Q4 _____
- 5 Smart Goals

Apply the **A.C.E. Lens**—**Alignment** to funder/IRS purpose, **Clarity** of roles & outcomes, **Evidence** of need and feasibility—at every step.

IX. The A.C.E. 12-Step Grant Checklist

Every step of the 12-Step Grant Writing Blueprint must demonstrate A.C.E.

A – Alignment → Show how the step connects to funder priorities and program mission.

C – Clarity → Define the purpose, roles, or outcomes clearly.

E – Evidence → Provide data, proof, or justification to support the step.

Step	A – Alignment	C – Clarity	E – Evidence
1. Build a team	Match expertise to funder expectations	Define roles & responsibilities	Highlight staff qualifications
2. Clarify needs	Connect needs to funder's mission	State the problem clearly	Use needs assessment data
3. Collect data	Show relevance to funder's focus areas	Establish baseline metrics	Use credible data sources
4. Identify funders	Ensure program–funder fit	Clarify funding categories	Research funder track record
5. Define goals	Align goals with required outcomes	Articulate broad outcomes	Support with performance data
6. Set objectives	Reflect funder's measurable criteria	Make objectives SMART	Link to evidence-based strategies
7. Create evaluation framework	Align with funder reporting needs	Clarify evaluation questions	Choose valid tools/methods
8. Draft management plan	Match funder compliance expectations	Define implementation roles	Document past management success
9. Plan for sustainability	Fit funder's sustainability requirements	Show long-term strategy	Provide partnerships or cost-sharing

10. Develop budget	Follow funder cost guidelines	Categorize costs clearly	Justify expenses with data
11. Proof and format	Meet compliance and submission rules	Clarify structure & flow	Verify references and accuracy
12. Submit via e-grant	Align with funder deadlines/process	Submit on time and correctly	Ensure attachments/data are accurate

X. 12 Step Checklist

☐ Name cleared/reserved

☐ Articles filed (purpose + dissolution)

☐ Bylaws adopted; policies approved

☐ EIN received; bank opened; controls set

☐ Programs, logic model, Y1 plan

☐ 3-year budget approved

☐ 1023-EZ/1023 filed (Pay.gov receipt)

☐ State charity registration/exemptions

☐ 90-day fundraising plan + CRM

☐ Document locker + insurance

☐ Compliance calendar + 990 tickler

☐ First impact brief published

XI. Develop a comprehensive Crowdfunding Campaign Planner for Kickstarter / GoFundMe)

Project Idea	Goal	Rewards/Impact	Marketing Plan	Launch Date

Crowdfunding Campaign Planner (Kickstarter)

Fillable template + sample summary (The Beast School Climate System).

Sample: BEAST Kickstarter Summary

- Campaign snapshot: The Beast SOS Library & School Climate Launch; tagline "Teamwork + SEL tools so every student thrives"; 30-day window (Oct 20–Nov 20, 2025); goal $40,000 with stretch goals for a GA pilot, a Parent Support portal, and an animated read-aloud.
- Story & proof: The campaign centers on The Beast and the Least and its core lesson—every member of the team matters—and rolls up to the Beast School Climate System (Student Development, Professional Development, and Parent Support modules). The model emphasizes a whole-school approach and unites students, staff, and parents to improve the ABCs: Achievement, Behavior, and Climate.

- SEL Library: Vol. I titles map to SEL competencies (Self-Awareness, Self-Management, Social Awareness, Relationship Skills, Responsible Decision-Making).
- Rewards aligned to pricing: The Beast and the Least eBook $6.95; paperback $14.95. Student/Parent/Professional Development modules: eBook $19.95, print $29.95. These anchor tiers and fulfillment estimates.
- Audience plan: Segmented messaging for educators/schools, parents, community, and business sponsors; first 48-hours actions included.
- Visuals & media: 60–90s video outline plus hero images, infographics, and testimonials.
- Budget: Production, fulfillment, marketing, platform fees (~8–10%), and contingency (12%) rolled up to the $40k goal.
- Post-campaign: Backer wall, surveys, fulfillment schedule, and a 60/120-day impact report.

Generic Fillable Planner

Use the fill-ins to build a Kickstarter plan from pre-launch through fulfillment.

1) Campaign Overview
Snapshot: what you're making, for whom, and why now. Goals should include production, rewards, shipping, taxes/fees, and a 12–15% buffer.

Project Title	Tagline (≤60 chars)	Start Date	End Date
Campaign Goal ($)	Primary Outcome	Stretch Goal #1	Stretch Goal #2
Stretch Goal #3	Creator Location	Category	Team Members

2) Story Development

Tell a crisp problem–solution–impact story, then prove you can deliver.

Problem / Need	Solution (what you're making)
Hero Narrative (why you/why now)	
Evidence (pilots, testimonials, data, certifications)	

3) Target Audience

Audience Segment	Motivation to Support	Messaging Angle	Outreach Strategy

4) Rewards Structure (Backer Incentives)
Design rewards that feel generous yet simple to fulfill. Include delivery dates and true costs.

Contribution Level	Reward	Delivery Timeline	Cost Estimate	Notes

5) Marketing & Outreach Plan

Channel	Strategy	Responsible Person	Timeline	Status

6) Visuals & Media

Asset	Notes	Responsible Person	Status

7) Budget & Resource Planning

Item	Estimated Cost	Notes

Suggested lines: production (video/graphics), fulfillment (print/pack/ship), marketing/promotion, platform/processing fees (8–10%), contingency (10–15%).

8) Post-Campaign Follow-Up

Activity	Timeline	Responsible Person	Notes

Typical items: thank you messages and backer wall; surveys/address collection; fulfillment batches; impact report at 60/120 days; next steps.

Notes:

XII. Grant & Resource Development Services
Fee Structure & Scope of Services

Base: Columbia, SC 29201 | Serving Clients Nationally

Grant & Resource Development Workshops

On-Site Grant Writing Workshop (Full Day)
$4,500 + travel and lodging
Includes templates, grant strategy framework, and implementation tools.

Virtual Grant Writing Workshop (Half Day)
$2,250

Customized Grant Development Services

Federal or State Grant Proposal (Full Development)
$3,500 – $5,000
Includes planning sessions, narrative development, budget collaboration, and final submission support.

Foundation or Corporate Proposal Development (Full Development)
$2,500 – $4,000

Notes:

• Multi-year district contracts available
• Travel and Lodging billed at cost
• Bundled services discounted
• Title, Perkins, and ESSA-aligned services