



# Grant Writing 201

Budgets & Project Timelines

AN INVEST NATIVE INITIATIVE

The Wells Fargo logo, consisting of a red square with the words "WELLS" and "FARGO" stacked vertically in white, uppercase, sans-serif font.

WELLS  
FARGO

February 2024



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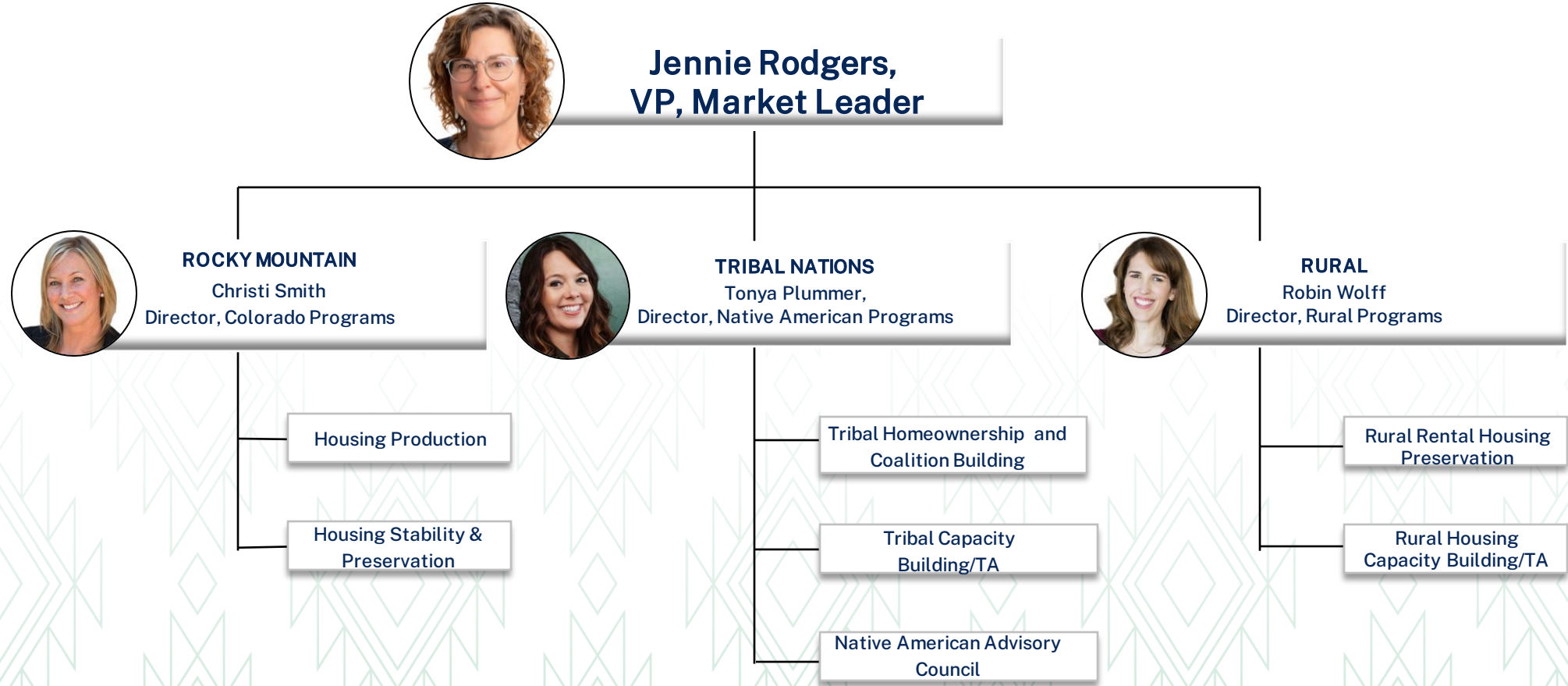


# LAND ACKNOWLEDGEMENT

# We Are On Native Land



# Rocky Mountain, Tribal Nations and Rural Markets





# Tribal Nations Team

Enterprise Community Partners



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# Tribal Nations Team



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SUPPORTING NATIVE COMMUNITIES  
**INVEST NATIVE**



# Invest Native

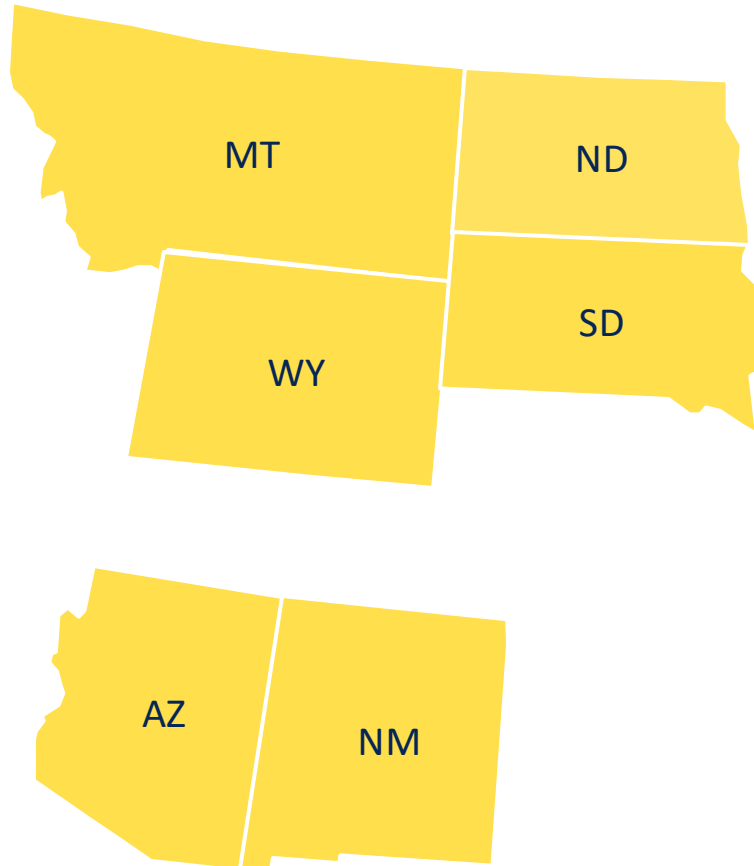


Invest Native is a \$20 million philanthropic effort to support Native-led nonprofit organizations and the communities they serve in New Mexico, Arizona, Montana, Wyoming, North Dakota, and South Dakota.

Funding priorities include housing access and affordability, small business growth, financial health, and sustainability and climate resiliency.



# Invest Native: A multi-year philanthropic initiative in six states



- The Dakotas, Mountain Plains and Southwest Regions are home to many key Native-Led nonprofit organizations
- Regions include six of the 10 states with highest percentage of Native Americans
- Directly addresses concerns raised in listening sessions with Native leaders
- Leverages momentum and organic work of existing Native coalitions
- Will inform future support of Native efforts in other territories

# Intentional Capital



**Fearless  
Philanthropy**



**Strong  
Relationships**

**Lasting Results**

# Statement of Strength



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Native American, Alaska Native and Native Hawaiian communities are often located in some of the most rural and remote locations in the country.

They face a unique set of challenges have begun to implement unique solutions.

These organizations, when well resourced, can serve as engines of economic mobility.

Invest Native supports the strength of these Native-led, Native serving solutions.

# Invest Native Pillars

## Eligible Focus Areas



### Housing Access & Affordability

Focus is to strive to foster interventions and innovative solutions that increase access to affordable, sustainable, and wealth-generating housing for vulnerable populations and communities. Emphasis will be on driving innovation, opening doors to access & affordability, keeping people housed.



### Small Business Growth

Focus is to primarily support initiatives that accelerate growth opportunities for established small businesses to help them scale. Investments center on key drivers of growth: Capital, Network, and Knowledge



### Financial Health

Focus is to invest in foundational structures and transformative solutions that address systemic inequities, build financial security, and advance wealth and legacy creation among historically marginalized communities. Emphasis is on Opening Pathways to Economic Advancement by increasing financial inclusion and access, driving wealth building and transfer, empowering youth/young adults with financial capability, and discovering & implementing innovative solutions.



### Sustainability & Climate Resilience

Focus is to support sustainability initiatives that drive an equity-focused transition to a low-carbon economy. Emphasis is to support equitable local/state implementation of the Inflation Reduction Act (IRA)/Greenhouse Gas Reduction Fund (GGRF) and enabling national platforms; foster investable climate resiliency activities in vulnerable communities.

# How will these funds be invested?

## Native-led Coalitions

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- South Dakota Native Homeownership Coalition
- Mountain / Plains Regional Native CDFI Coalition
- Tribal Homeownership Coalition of the Southwest
- Montana Native Homeownership Coalition

## Individual Organizations

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- Individual Native-led and Native-serving 501(c)(3)s
- Native Community Development Financial Institutions
- Tribally Designated Housing Entities

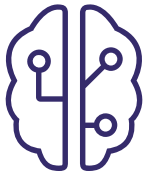
# What do we want to accomplish?

In the second year, Invest Native will:

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**Create positive outcomes** for families, small businesses, and communities including more single and multifamily housing construction, access to capital for small businesses and consumers, and financial health programs



**Strengthen infrastructure** for Native-led organizations by funding projects that improve their technology and systems so groups can be more efficient in assisting families and small businesses



**Invest in asset-building tools**, peer-to-peer learning and training, and research that sheds light on the distinctive needs of Native communities and prepares staff to utilize best practices in their work

# CHECK POINT





# GRANT BUDGET



**Do you already have a consistent template you use to create project budgets?**

**Put your responses in the chat!**

# What's in a budget?

Creating Structure that Helps Funders Understand and Trust Your Project

## • Best Practices for Forming Your Budget

- Expenses must be eligible, reasonable, and directly relevant to the project
  - Benchmarking – how do we determine a “reasonable” cost?
- Ensure that there is a relationship between your narrative and the budget

## • What are Red Flags for Reviewers?

- Large indirect costs
- Large, unspecified travel & professional development allocations
- Exceptionally high salaries, large pay gap between staff levels
- Common expenses that are higher than normal

## Invest Native – Ineligible Activities

### • Grants will not be considered for the following:

- Individuals
- Organizations that discriminate on the basis of race, gender, gender identity, sexual orientation, ethnic origin, country of origin, citizenship, veteran status, or disability status
- Religious organizations unless they are engaged in programs that are non-sectarian, benefit a broad base of the community have a separate 501(c)(3) designation.
- Political action committees, candidates, programs, or leagues.
- Recreation, athletic, or sports teams, programs, or leagues.
- For-profit entities, including start up small businesses.
- Grants specifically for travel, including student trips or tours.
- Organizations that are not aligned with the four philanthropic pillar areas defined above.

# Invest Native Eligibility

You have a few options to complete a budget!

- Your Invest Native application must include a budget.
  - You can use:
    - the template we're providing,
    - the template available in Cybergrants, OR
    - one that you already have
  - **HOWEVER**, it must include the following core elements:
    1. Line-item level amount to be funded by Invest Native and justification
    2. Category-level total project cost
    3. Project-level list of other funding streams



# Learning Our Template

Invest Native applications without a completed budget will not be considered

## Invest Native Budget

- The purpose of this budget is to tell the grant reviewer *how you would spend the funding you're requesting from Invest Native.*
- Information Included:
  - Expenses by Category
  - General Itemization
  - Budget Justification
    - How did you get to this number? Tell us about your benchmarks, etc.

## Overall Project Budget

- The purpose of this budget is to tell the grant reviewer *how Invest Native funding fits into your funding stack for the project.*
- Information Included:
  - Total project costs
  - Leverage from other funding streams
  - The percent of project costs contributed by Invest Native
  - Each expense category as a percent of the total project costs

### HOT TIP:

There are formulas built into this template that will auto-populate a lot of data!

# An Overview of the Budget Template

With Special Guest

**Will MacArthur**

Enterprise's Impact & Evaluation Team



## Letter of Interest: Project Description (Housing Access & Affordability)

*The cost of housing for college students is too high, creating barriers to access for youth who are first-generation college students, grew up with lower income households, or must leave the reservation to receive a quality education. In Casper, WY - the nearby metropolitan area to our services - average student rent for a shared space is approximately \$750/month. Our "Modernizing the Mobile Home" project will transform donated vans and campers into adequate housing for Tribal youth to utilize during the school year. With Wells Fargo funding, we hope to purchase a lot nearby several local universities so that Tribal youth will have a safe place to park their Modern Mobiles, as well as develop some communal spaces such as a kitchen, small laundry, and covered gathering space. Our organization is leveraging a forgivable infrastructure loan from the local municipality for water utility access, we will charge \$50-\$100/month in rent to cover ongoing maintenance costs, and we are partnering with the Hardware Store Foundation to cover rehab costs of the donated vans and campers (\$10,000/camper). With this one lot, we hope to house 8 Tribal youth and their Modern Mobiles; with the success of this project, we are eager to develop additional lots for this purpose. [207 words]*



# Practice Budget

Mo's Modern Mobiles

## Invest Native Budget

- Staff Time
  - 10% Executive Director (\$75K/year) - \$7.5K
  - 100% Program Coordinator (\$50K/year) - \$50K
  - 25% Housing Counselor (\$60K/year) - \$15K
- Land Purchase
  - Lot - \$200K
- Common Spaces
  - Kitchen - \$50K
  - Laundry - \$70K
  - Garden - \$7.5K

## Project Budget

- Expenses
  - Total Staff - \$125K
  - Total Benefits - \$42K
  - Total Technology - \$25K
  - Total Professional Development - \$10K
  - Total Other - \$475K
  - **TOTAL - \$677K**
- Revenues
  - Invest Native - \$400K
  - Local Forgivable Loan - \$150K
  - Hardware Store Foundation - \$130K
  - **TOTAL - \$680K**





# CHECK POINT



# PROJECT TIMELINES

# What's in a project timeline?

Creating Structure that Helps Funders Understand and Trust Your Project

- Best Practices for Completing a Project Timeline 
  - What is the **primary objective** of your project?
  - What **goals** need to be completed to achieve your objective?
  - What **activities** are required to achieve your goals?
- Red Flags for Reviewers 
  - Timelines that are too quick or too long
  - Goals without well thought-out activities
  - Too many goals and activities than can be achieved in the performance period of the grant

## Invest Native – Things to Consider

- ***The period of performance is one year.*** Even though Wells Fargo Foundation has pledged multiple years of funding to Indian Country, each award given must be expended within 12 months of issuance.
- Only focus on what you will accomplish with Invest Native funding within the one-year award period.
  - We know that many of your overall projects may take longer than a year, but you can discuss that in the narrative portion of your response.

# An Overview of the Timeline Template

With Special Guest

**Will MacArthur**

Enterprise's Impact & Evaluation Team



# CHECK POINT



# SNEAK PEAK

# Invest Native NOFO

Our First Look at This Year's Funding Opportunity

- Join us on **March 7 @ 10aMT** to learn specifics about the eligibility and process of applying for Invest Native
- **REMEMBER!** The Letter of Interest opens on April 1 and closes on April 24.
  - If you are receiving newsletters and webinar invitations, then you will receive a notification about the LOI opening.
- Have friends who want to join the mailing list?
  - [InvestNative@wellsfargo.com](mailto:InvestNative@wellsfargo.com)





# SAVE-THE-DATE

## National Tribal Housing Ecosystem Summit

August 27-29, 2024  
Boise, Idaho

# National Tribal Housing Ecosystem Summit

.....  
Uniting Voices  
Across Tribal  
Community  
.....

AUGUST 27-29, 2024  
BOISE CENTRE  
BOISE, IDAHO

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# FINISH LINE

# Thank You

