

March 2008

New Location

AFE has now officially moved its offices from Juneau to Fairbanks. It is great to have the company located in the community where it was conceived. Our Juneau clients need to know we still have a very strong presence in our capital city – and will continue to provide services to all of Southeast Alaska, as well as the rest of the state, just as we have for the past 16 years.

New Website

As you begin to look closer at AFE you will notice not only a new e-newsletter design but also a newly designed website: funding-exchange.org. I think you will find the new design pleasing to the eye, easy to navigate, and rich in content.

New Services

AFE has also brought on board several new staff and consultants, and will be offering expanded services in the area of program planning and evaluation. Take a look at all of the services that AFE now provides on our website at funding-exchange.org/services.php.

AFE Introduces New President/CEO: Sharon Charnell Gherman

by Cynthia M. Adams, President/CEO GrantStation.com, Inc.

If you haven't already noticed from the design, the February issue of The Exchange is different than usual. This is because we have a new President and Chief Executive Officer, Sharon Charnell Gherman who has, in her very brief time with AFE (since mid-January), made some wonderful changes.

AFE is proud to announce that Sharon has purchased AFE and will be the new President and CEO, taking the reins from Mary McRae Miller (CEO) who managed AFE for the past four years. Sharon brings 30 years of experience to AFE with demonstrated leadership capabilities and success in both the nonprofit sector and small companies.

Sharon has been nationally recognized for her innovations in program development and implementation, and brings a variety of strengths to the AFE staff, including program planning and evaluation, project administration, and individual and organizational capacity building.

New Look: New Services

As you begin to look closer at AFE you will notice not only a new e-newsletter design but also a newly designed website: www.funding-exchange.org. I think you will find the new design pleasing to the eye, easy to navigate, and rich in content.

Both of these AFE signature pieces reflect Sharon's leadership and change in direction for the company. As the months go by, I believe you will find more and more vital information and resources for those of you trying to secure funding in today's very challenging economy.

Besides delivering new information, AFE has also brought on board several new staff and consultants, and will be offering expanded services in the area of program planning and evaluation. Take a look at all of the services that AFE now provides on our website at <http://www.funding-exchange.org/services.php>.

I have been asked to serve as Senior Consultant for AFE, and am thrilled to be included in their on-going work to help build healthy communities throughout Alaska.

New Location: New Partnership

AFE has now officially moved its offices from Juneau to Fairbanks. It is great to have the company located in the community where it was conceived. Our Juneau clients need to know we still have a very strong presence in our capital city – and will continue to provide services to all of Southeast Alaska, as well as the rest of the state, just as we have for the past 16 years.

Part of moving to Fairbanks will include a closer relationship with AFE's sister company, GrantStation. For those of you who don't know, GrantStation was an outgrowth of AFE, launching in the fall of 2001. Today GrantStation has over 14,000 Members throughout the world, and over 175,000 people who opt in to receive their weekly e-newsletter, the GrantStation Insider.

Again, my heartiest welcome to Sharon as the new President and CEO of AFE, and a fond farewell to Mary for her good work throughout the past several years.

Welcome from AFE's New President

I'm pleased to present our initial edition of The Exchange in its new, redesigned format. I hope you'll find it easy to read and full of information that's practical as you develop your organization.

As you browse through our redesigned web site, you'll notice a number of changes in AFE's structure and services. We're refocusing on Cindy's original model of using outstanding contractors and content experts to offer you the best possible expertise and assistance, and while AFE continues to offer outstanding fundraising research, writing and training, the services available and the way we offer them are expanding.

The new modular format of AFE's services allows you to cost-effectively pick and choose which of our services will meet your need at this time. You're not forced to purchase a "package" you may only need a part of -- you use AFE's assistance for only the help that you need at this time. So we can assist your grant writer by editing their work; complete funding research for a program area and create a written Case

for Support that your grant writer can use over and over again to convincingly present your case to potential funders; or we can write that proposal that your development department wants to pursue but just doesn't have time for right now.

I welcome your feedback and suggestions for ways to improve The Exchange in future months - Would you like to be able to make organizational announcements? Advertise open positions? Notify our readers of changes in your organization? Are there continuing education subjects you'd like to learn more about through The Exchange? Please [let me know](#) how you like this edition and what you'd like to see in the future.

Sincerely,

Sharon Charnell Gherman
President/CEO

Grantwriting Workshop: April 17-18 in Fairbanks

The Alaska Funding Exchange and GrantStation are teaming up to offer a two-day grantwriting workshop in Fairbanks -- just in time for the grantwriting season! Intended for beginning to moderately-experienced grant writers, Cindy Adams and Sharon Gherman will co-teach this workshop on April 17 & 18. Cost is \$325, with a 10% discount for more than two participants from the same organization. [Register now](#)

The Funding Matrix: Simplifying Complex Programs

by Sharon Charnell Gherman, AFE President/CEO

In the middle of planning a large educational program years ago, I realized I needed a way to "wrap my brain" around the complexities of the project.

The first challenge was that the program was very large and would be funded through a variety of sources. Secondly, although I was receiving many grant announcements and Requests for Proposals (RFP's) each day, I needed a way to quickly determine whether any given RFP was something for which we wanted to apply. And finally, I needed an effective way to present this complex program plan to my Board in a simple and easy-to-understand format.

The funding matrix that follows is the result of my experimentation. It successfully addresses all the challenges listed above and even provides a few additional benefits. I've used it many times since that initial project, and I've found it to be useful in a wide variety of planning situations on nearly every topic.

I designed the funding matrix in Microsoft Excel so I could add and tabulate using formulas, and so I could use multiple worksheets all feeding into a single funding matrix on top. We'll see how to accomplish this in a minute.

Funding Matrix for Grants Planning

Description	Annual Budget	Grant #1	Grant #2	Grant #3	Grant #4	Operating Funds	Remaining Need
Personnel	25,000	10,000	0	5,000	0		10,000
Employee Benefits	7,500	3,000	0	1,500	0		3,000
Utilities	15,000		12,000	1,000	3,000		-1,000
Housing/Space Rental	160,000	25,000	16,000	0	5,000	2,000	112,000
Travel/Transportation	12,000	2,000	2,000	6,000	0		2,000
Equipment	20,000	0	0	12,000	2,000		6,000
Supplies	12,000	2,000	2,000	0	2,000	4,000	2,000
Advertising	15,000	0	2,000	5,000	3,000		5,000
Curriculum	25,000	5,000	4,000	0	0		15,000

Budget Descriptions

Looking at the sample funding matrix above, the far left column (Column A) lists every category of your program's annual budget. You create this column by listing each budget category found within your project budgets, such as Personnel, Travel, and so on.

Annual Budget Totals

The second column (Column B) shows the total annual amount budgeted in each category. If your program includes multiple projects with a separate annual budget for each, MS Excel's layered worksheets can accommodate each budget. The numbers in the second column are the totals in that category for all the projects listed on the worksheets beneath.

Combining Multiple Budgets

To combine multiple budgets into one funding matrix, leave the top worksheet blank (for now) and start with the second worksheet (locate the "tab" to the right of the top worksheet tab on the Excel desktop). Place the annual budget for each project on a separate worksheet, and as you build your funding matrix, total the cell information from each project budget into the funding matrix budget.

You may need to visit Excel's "Help" tutorials to learn how to accomplish this, but it's worth the extra effort to learn. It's not as hard as it sounds, and the result will allow you to update a budget number once and have it transfer all the way through the worksheets to the funding matrix, saving you loads of time in the future.

Funding Sources

Beginning in the third column (Column C-G on the example above), each funding source is listed separately in its own column. Funding sources may include "restricted" funds, which must be spent in a designated budget category only, and "unrestricted" funds which are flexible and can be spent on any aspect of the program. Typically, grant funds are restricted funds - they must be spent exactly as outlined in your grant application budget. Income from sources like membership fees or general operating funds is flexible, and these numbers will become a powerful tool in your funding matrix, as we'll see later.

List each source of funds in a separate column, with headers like "USDA Grant", "Membership Fees", or "Product Sales". Shade any worksheet cells that contain unrestricted funds so they can be easily identified later (see Column G above).

Using the Matrix

Next month, we'll learn how to use the funding matrix to simplify your funding research, identify areas of remaining need, and prepare presentation materials that clearly and simply describe your program for your Board, employees or constituents.

A Giving Business – Philanthropy & Industry in Alaska

A new *Exchange* feature for 2008, *A Giving Business* is a monthly philanthropy summary of companies and organizations featured in Alaska Business Monthly magazine. If ABM features the mining sector in January, in February *The Exchange* will list the philanthropy programs of the same mining firms. We'll archive previous listings in a searchable format on our website, so check back with us regularly!

Below you'll find philanthropy information for participating technology companies from ABM's December 2007 IT Directory. As an additional resource, we suggest you read the complementary article [Ten Tips for Securing Corporate Funding](#), available on our website.

[Check out the full list on our website!](#)

Interview with AT&T's Director of Corporate Communications, Cathy Opinsky:

How has AT&T's recent acquisition of Cellular One affected the company's corporate giving programs? The acquisition of Cellular One has allowed us to focus our giving efforts under one world-wide brand, AT&T. There is one local point of contact for non-profits which should simplify things for everyone.



What types of corporate giving (sponsorships, cash grants, etc.) does AT&T prefer to give in Alaska? AT&T gives to a wide variety of non-profit organizations throughout the State of Alaska focusing on Arts, Education and Healthcare. Most of our giving is in the form of cash and in-kind donations (e.g. logoed wear, prepaid cards, and in some limited cases, cellular phones). However we do not donate our calling plans or services. We also look for opportunities that benefit the community as a whole. Statewide initiatives are attractive because AT&T operates throughout the entire state offering long distance service to every community with 25 or more residents.

What recent AT&T contributions in Alaska most closely match the corporation's philanthropy goals? AT&T is proud of the contributions we've made to over 160 Alaska non-profits in 2007. Some significant contributions were to the Providence Cancer Center, University of Alaska and the Alaska Junior Theater.

What are the most common mistakes you see from nonprofits seeking contributions from AT&T? I don't know if mistake is the right word to use...however sometimes we see the AT&T name or logo in print when we have not had the opportunity to review it. We know that this responsibility lies on both sides - the corporation must communicate its requirements and the agency should allow time in production schedules for proofing of materials.

Another piece I think is worth mentioning is the time invested in building relationships. Some non-profits we support have amazing relationship skills. They meet with us and update us on programs and projects. They make sure there is a personal touch in their proposals and take an active role in understanding our goals. This is very much appreciated.

What would you like Alaska's nonprofits to know about AT&T and their corporate giving programs? AT&T is a vital part of every community where we do business. From one town to the next our goal is simple: to help the places where we live and work become as strong and vibrant as they can be.

Corporate Philanthropy is Good Business

If you would like to re-think your existing corporate giving guidelines, or develop new ones, contact the Funding Exchange. The Funding Exchange staff can help you launch a new program, monitor grantee activities, and evaluate your present giving.

We can help even small corporate giving programs reap big benefits.

Contact Sharon@funding-exchange.org for more information

