



HUMBOLDT AREA FOUNDATION

Consulting Grant (formerly *Technical Assistant Program (TAP)*)

Humboldt Area Foundation promotes and encourages generosity, leadership and inclusion to strengthen our communities

Grant size: Up to \$5,000

If your organization is in need of a larger grant, please consider applying to our Community Grant program. Consulting Grant funding is limited. HAF makes approximately 5-10 Consulting Grants per year

Deadlines: March 1, June 1, September 1, December 1

Email to: grants@hafoundation.org

Or mail to: Humboldt Area Foundation, 363 Indianola Road, Bayside, CA 95524

- Applicants will be notified of funding decision within eight weeks of proposal deadline
 - For questions or application assistance please contact Amy Jester: (707) 267-9909 or amyj@hafoundation.org
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The Consulting Grant is a program of Humboldt Area Foundation's Rooney Resource Center. As with other Resource Center services, the Consulting Grant is available to organizations and community groups serving Humboldt, Del Norte, Trinity, and Curry Counties. Applicants must be nonprofit charitable or public benefit (federal tax exempt) organizations, public schools, government agencies, Indian tribal governments or have a qualified fiscal sponsor.

The Consulting Grant is a small grant program which provides organizations with one-on-one technical assistance with a consultant of their choice. Consulting Grants focus on organizational development and strategy to strengthen nonprofit effectiveness in order to have greater impact in your community work. Generally, organizations may only apply for a Consulting Grant up to once per year.

Grants may include, but are not limited to, working with a consultant on:

- Planning, Problem Solving & Solution Creating: Strategy, Fiscal, Business, Capital, Feasibility, Fundraising Planning (*generally not Grant Writing*), Communications, Organizational Meltdowns
- Community or Constituent Engagement: Involving those you serve in problem solving, program planning, development and evaluation
- Building or Increasing Effectiveness of Partnerships, Collaborations or Mergers
- Increasing Equity and Inclusion in Organizational Policy, Process, or Structure
- Assessments: Organizational, Operational, Fiscal, Programmatic
- Evaluation
- Financial Management, Strengthening Fiscal Systems
- Dissolution
- Training & Leadership Development: Board and Staff Development or Executive Coaching
- Succession Planning
- Human Resources & Personnel Issues

Generally, Consulting Grants do not assist with website development, social media strategy, or grant writing.



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Application Process:

HAF encourages applicants to discuss their technical assistance needs with Program Manager for Nonprofit Resources, Amy Jester, before submitting a proposal. Prior to applying for a Consulting Grant, organizations should also contact the consultant of their choice to discuss their needs. If you need a list of local consultants, please ask Resource Center staff. *Please submit a proposal from the consultant you plan to work with including expected hours, fee, and scope of work.* HAF will not consider consultant fees greater than \$250/hour.

Eligibility:

Organizations working in the following ways will be considered for a Consulting Grant:

1. Addresses a pressing community issue

- Improves areas such as health, wellness, creativity, culture, education and/or economic security
- A diverse cross section of people identify a need or issue in their community as important and are coming together to create solutions around that issue

2. Makes use of collaborative relationships and partners

- Proposal includes local expertise, leadership, youth community partners, funders, and/or businesses
- This may include but is not limited to the development of leaders' abilities to build bridges between people of different cultures, backgrounds and beliefs

3. Improves quality of life

- Improves community member's well-being by removing barriers that are based on social, economic or racial factors
- Increases access to tools, resources or opportunities for those experiencing disparities to enable full participation in their communities
- Engages people directly impacted by a particular issue so that their experiences and knowledge shape the organization's or project's understanding of related needs, opportunities, and solutions

4. Integrates and promotes leadership skill development for youth and residents

- Strengthens the skills and abilities of residents, groups and organizations to identify, analyze, collaborate, and solve pressing community issues



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Getting Started with Consultants

As you plan for your Consulting Grant consultation, please consider these suggestions:

Step 1: Clarify Your Needs and Expectations

Consultants are typically sought to help solve a problem or accomplish a specific task. Before contacting any potential consultants, you should be able to answer these questions –

- What outcomes are you looking for? What should be different at the end of the consultation?
- What problem are you trying to solve and why?
- Who will be impacted by the work done in the work with the consultant? How and why will they be involved in the consultation (before during or after your time with the consultant)?
- What role do you want the consultant to play? How long do they need to engage with your organization to achieve your desired outcomes? How might their level of engagement change over the project timeline?

Consultants will also want to know how much you expect to spend, why you are seeking outside help, and any internal politics around the project

Consultants can bring skills, experience, tools, time, energy, inspiration and perspective to help you solve your problems but they will not do all the work for you nor will they do it alone. You (your board/staff) should plan on working closely with the consultant throughout the process. The more involved you are the happier you will be with the results.

Step 2: Find the Right Consultant

Consultants can be found through the Rooney Resource Center, your networks, or the internet. This is the easy part; the hard part is assessing skills, experience and working styles to identify the right consultant for you. In addition to requesting a CV and/or specific references, questions you might consider asking the candidate include:

- Who have you worked with on issues similar to ours, what did you do for them, what was your approach (and why), and what was the outcome?
- How would you describe your working style?
- What do you expect of your clients?
- How would you approach working on this project with our organization to achieve our desired outcomes?



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Questions for the consultant's former clients/references may include:

- Describe the project the consultant was hired for. What techniques and processes did the consultant use? What did the consultant accomplish for you? Were your desired outcomes and goals met?
- Did the consultant stick with your timeline and budget?
- How did the consultant communicate? Were they able to be open, honest, and authentic with staff in positions of power, or did they shy away from difficult conversations?
- How did the consultant handle sensitive and confidential information? Did you trust them and feel safe enough to be transparent about what's happening within your organization? What did the consultant do to build trust?
- Were your priorities and goals aligned or did you feel like the consultant was pushing their own agenda? How did you resolve any differences?

One way of assessing and comparing consultants for larger projects is to issue a Request for Proposals (RFP) or Request for Qualifications (RFQ). Typically, these documents describe the project or need and request the submission of a work plan, qualifications and cost estimate (RFP) or the submission of qualifications and fee schedules (RFQ). Contact the Center for help and guidelines on RFPs and RFQs.

Step 3: Put it in Writing

Once you have found the right person, commit your agreement to paper and have both parties sign it. This can be a simple "letter of agreement" or a detailed contract. Either way, it should include the following elements.

- The work plan or "scope of work," including a description of all products or "deliverables" and their due dates. This is often an attachment.
- The amount of the contract and/or any payment arrangements and/or amounts.
- Mediation and contract termination stipulations.
- If appropriate, copyright and ownership stipulations.

The Rooney Resource Center has a variety of tools to assist you in preparing for working with consultants, including sample contracts, requests for proposals and other helpful resources. **Contact Amy Jester for more information: amyj@hafoundation.org**



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CONSULTING GRANT Application

Please include a proposal from the consultant you plan to work with, including expected hours, fee structure and scope of work. If you are requesting support for training please attach detailed information about the opportunity or product.

Organization/Applicant: _____ Date: _____
Project Title: _____
Contact Person: _____ Amount Requested: _____
Amount your organization is able to contribute to this project: _____
Mailing Address: _____
City: _____ Zip: _____
Phone: _____ Email: _____
Tax ID Number: _____ Website: _____

Please respond to questions 1 – 5 in an attachment (3 page maximum, not including consultant proposal or information about training, equipment, or other purchase estimates):

- 1. Briefly describe your organization, mission, what programs or services you offer to achieve your mission, communities or populations served, and how you engage with other organizations and groups to create community change in service to your mission.
2. Please provide a brief summary of how your organization meets eligibility criteria for this grant.
3. Describe your organization's need for assistance and how you'll use the Consulting Grant: What problem would this grant help you solve for? What outcomes do you hope to achieve? What's your strategy for achieving those outcomes? How will this approach help your organization be more effective in serving the community? Why is now the strategic time for your organization to do this work? Who will participate in and benefit from the process or training (list specific staff titles, board members)? What steps will your board and staff take to continue to work on these issues after the Consulting Grant has ended?
Please also share what steps your organization has already taken to tackle this issue or to lay the groundwork for using your consulting time or training most effectively.
4. Please share why you chose this particular consultant, training or technology to help you accomplish your goals. In summary, what was your vetting process? Please include the consultant's proposal or information about the training.
5. Please include the full project budget, share why it is necessary for an external grant to support this effort, and whether you are seeking additional grants from other funders to make the project happen.

HAF Office Use Only:

Program Manager: _____ Committee: _____ Fund ID _____
Review Date: _____ Action: _____ Profile # _____
Grant Date: _____ Amount _____ Grant # _____
Batch # _____

Award Package (letter, grant report, photo release & folder):

Special Instructions:

Program Area: ANML COMM ARTS ENV HEAL TA YUTH