**CHARITY BALL ASSOCIATION**

# Building a Strong Funding Request

*Helping Us Understand Your Need, Your Request & the Difference CBA Funding Can Make*

## Why We're Here

CBA has the privilege of learning about the work nonprofit organizations are doing for children throughout Bexar County.

We also recognize that applying for funding takes time. Our goal is to make the process as clear and useful as possible so that agencies understand what CBA needs to know and can focus their time on the information that matters most.

Each year, CBA receives more eligible requests than we are able to fund. Meeting our eligibility requirements allows a request to be considered, but it does not guarantee that it will advance through the grant process or ultimately receive funding.

At its simplest, we are trying to understand four things:

**THE CHILD • THE NEED • THE REQUEST • THE IMPACT**

A strong request helps us clearly see the connection between all four.

## How CBA Funds

The needs of children and the organizations serving them vary in size, timing and scope. CBA has three funding pathways designed to respond to different types of needs and opportunities.

Understanding those pathways can help you determine where your request fits best.

### Standard Grants

Standard Grants are CBA's annual grant process for defined projects, programs and needs that meet our established eligibility requirements.

The process begins with a Letter of Intent and progresses through additional stages of review for agencies invited to continue.

Standard Grants are reviewed by the Charities Committee, which also oversees the Children's Opportunity Fund.

CBA funds an agency through the Standard Grant process every other year. If your agency receives a Standard Grant, it must sit out the following Standard Grant funding cycle before being eligible to receive another Standard Grant.

If you apply but are not selected for funding, you may apply again the following year.

The every-other-year limitation applies to agencies that receive Standard Grant funding—not to agencies that apply and are not funded.

### Children's Opportunity Fund

The Children's Opportunity Fund, or COF, allows CBA to respond to qualifying immediate or critical needs that arise outside the traditional Standard Grant cycle.

COF requests are also considered by the Charities Committee.

Its purpose is responsiveness—giving CBA the ability to consider a significant need affecting children that cannot reasonably wait for the next Standard Grant cycle.

### Significant Impact Gift

The Significant Impact Gift, or SIG, is a separate funding pathway for larger opportunities capable of creating substantial impact for children in our community.

SIG is reviewed through a separate committee and process from Standard Grants and COF.

That distinction is important. A request submitted through the Standard Grant process cannot simply be moved to SIG, and a SIG request cannot be moved into the Standard Grant process.

### Can an Agency Apply Through More Than One Pathway?

Yes.

When eligible, an agency may apply through Standard Grants, COF and SIG. The pathways are not mutually exclusive.

Each pathway, however, has its own purpose, eligibility requirements, timing and review process.

### Planning Ahead for SIG

SIG does not occur every year.

CBA may be moving toward a more regular cycle, potentially approximately every three years. Because timing may change, agencies should rely on CBA's website for current information about upcoming Significant Impact opportunities and application timing.

If an agency knows a SIG cycle is approaching and has a larger project or opportunity that may be particularly well suited for Significant Impact funding, it may want to consider the timing of that request.

An agency might choose to pursue a defined need through Standard Grants now, or it might decide to hold a larger opportunity for consideration through an upcoming SIG process.

That decision belongs to the agency.

CBA cannot guarantee that a request will receive SIG funding, and choosing to wait for SIG does not guarantee that the project will ultimately be funded.

The important point is to understand the pathways and plan accordingly.

## The Right Information at the Right Stage

CBA's Standard Grant process occurs in stages. We do not expect agencies to provide every detail at the beginning of the process.

The LOI is a first pass. At this stage, we primarily want to understand the child, the need, the request and the impact well enough to determine which requests we would like to learn more about.

Agencies invited to continue will have opportunities during application review to provide additional information about funding, bids or estimates, project readiness, timelines, outcomes and other details.

## The Role of the LOI

For agencies pursuing a Standard Grant, the Letter of Intent is the first stage of the process.

At this stage, we are trying to strike an important balance.

We need enough information to understand and evaluate your request, while also being mindful of the time and effort required of agencies applying for funding.

We do not expect the LOI to contain everything that would ultimately be included in a full application.

We do need it to give us a clear understanding of:

- who the children are; • the need you are addressing; • exactly what you are asking CBA to fund; • the amount you are requesting; • what difference the funding will make • The LOI is our first opportunity to understand the request and determine which requests we need to learn more about.

## Make the LOI Count

This is not about polished language or writing the perfect grant proposal.

It is about helping us understand the strength of your request.

Be specific. Give us the context we need. Help us understand why the need matters and what would change if CBA were able to fund it.

Because CBA receives more eligible requests than we can fund, the LOI should help us understand not only that your request is eligible, but why it represents a compelling and competitive opportunity for CBA funding.

A competitive request is not necessarily the largest project, the organization serving the most children or the greatest dollar amount.

It is one that clearly connects:

**THE CHILD → THE NEED → THE REQUEST → THE IMPACT**

## 1. Start With the Child

CBA's mission is to improve the lives of children in Bexar County.

So begin by helping us understand who the children are at the center of this particular request.

Who will benefit?

How many children will benefit?

What are their ages?

What circumstances or challenges are they experiencing?

How does this particular request connect to the services they receive?

### Your Agency's Reach Is Not Necessarily Your Request's Reach

Your organization may serve thousands of children each year. That gives us useful context about your organization.

But your particular request to CBA may benefit 100 children, 300 children or 1,000 children.

Those are two different pieces of information.

When we evaluate a request, we want to understand the children who will actually benefit from what you are asking CBA to fund.

That distinction also becomes important when we talk about cost per child.

### Child-Centric Does Not Always Mean Direct-to-Child

Not every CBA-funded dollar has to literally be spent directly on a child.

A roof, HVAC system, therapy equipment, technology, classroom furniture, playground or facility improvement can be highly child-centric when it creates, protects or improves the environment in which children receive services.

The important question is:

Can we clearly understand how this request benefits the children you serve?

## 2. Help Us Understand the Need

Once we understand who will benefit, help us understand why this request is needed.

What problem are you trying to solve?

Why is it needed now?

What happens if the need is not addressed?

How did you determine this was a priority?

Is this replacing something, expanding something, repairing something or creating something new?

Specific information is much more useful than broad conclusions.

Instead of simply telling us:

“Our equipment is outdated.”

Help us understand how old it is, what is no longer working, what limitations it creates and how those limitations affect children.

Instead of:

“Demand is increasing.”

Help us understand how demand has changed and what that means for the children you serve.

You know your organization, your field and the children you serve far better than we do.

Help us see what you see.

## 3. Be Clear About the Request

One of the most important things you can do is clearly answer:

What exactly are you asking CBA to fund?

If you are requesting equipment, tell us what equipment.

If you are requesting a renovation, tell us what will be renovated.

If you are requesting technology, tell us what will be purchased and how it will be used.

If you are requesting support for a program, tell us specifically what CBA dollars will support within that program.

If your request is one component of a larger project, help us understand which component you are asking CBA to fund.

And if there are several components, help us understand their priority.

We should be able to follow the connection:

**THE NEED → THE REQUEST → THE COST → THE BENEFIT TO CHILDREN**

## 4. Show Us What Will Change

Agencies must explain the expected impact on the children who will benefit from the request. The number of children served tells us the reach of the request; it does not, by itself, explain the difference the funding will make in their lives.

### What benefit will children experience

Describe the specific improvement the request is expected to create or preserve for children, such as safer surroundings, more reliable access to services, improved learning or therapeutic outcomes, or fewer interruptions in care. Connect that benefit directly to what you are asking CBA to fund.

How will you know the request made a difference? Identify practical indicators, how you will assess them and when you expect to see results. When available, describe the current situation and the improvement you expect. Use measures appropriate to the request; a facility repair does not need to demonstrate the same outcomes as a therapy program.

For example, a request for therapy equipment should explain how it will improve the therapy children receive or their ability to participate, in addition to reporting how many children will use it. An HVAC replacement should explain how it will maintain a safe, usable environment and prevent disruptions to services.

At the LOI stage, briefly explain the expected benefit to children. Agencies invited to continue should be prepared to explain in more detail how that benefit will be assessed.

Once we understand the request, help us understand what will be different for children if it is funded.

Maybe you will be able to serve more children.

Maybe children will have better access to services.

Maybe you will increase capacity.

Maybe a facility will become safer or more appropriate.

Maybe children will have access to better therapeutic or educational equipment.

Maybe replacing an aging system will prevent interruptions in services.

Different requests create different kinds of impact.

We are not looking for every project to produce the same outcome.

We are trying to understand the connection between the dollars requested and the difference those dollars will make.

## 5. Help Us Understand the Numbers

We need to understand more than simply the amount you are requesting from CBA.

At the LOI stage, we ask for only the financial information included on the LOI form. Agencies invited to submit a full application will have the opportunity to provide additional information about committed or anticipated funding, remaining funding gaps and other project costs.

Help us see the whole financial picture.

What does the entire project or request cost?

How much are you asking CBA to fund?

What other funding has already been committed?

What other funding is pending or anticipated?

What funding gap remains?

And importantly:

What happens if CBA cannot fund the entire request?

At the LOI stage, we ask only whether meaningful partial funding is possible and, if so, the minimum viable CBA funding amount. Agencies invited to continue will have the opportunity to explain what that amount would fund in the full application.

### Partial Funding: Give Us a Number

Simply saying:

“Yes, we would accept partial funding”

does not always give us enough information.

Instead, help us understand:

What is the minimum amount of CBA funding that would allow the project—or a defined portion of the project—to move forward?

And then tell us what that amount would actually fund.

For example, perhaps you are requesting $100,000.

Could the project successfully move forward with $75,000?

Could $50,000 fund one defined phase?

Or is the full $100,000 truly necessary before anything can proceed?

There is no wrong answer.

We simply need to understand what is feasible.

That information becomes particularly helpful when the committee is making funding decisions because it allows us to understand what CBA dollars can actually accomplish at different funding levels.

### Right-Size the Ask

There is no formula that determines the "right" amount to request.

The amount should make sense in relation to the project, the children served, the expected impact and the other funding available.

Help us understand how you arrived at the amount you are requesting and what that amount will accomplish.

## 6. Cost Per Child: Helpful Context, Not the Whole Story

Cost per child can be a useful way for us to understand the relationship between cost and reach.

A simple starting point is:

CBA Amount Requested ÷ Unique Bexar County Children Expected to Benefit from This Request Annually = CBA Request per Child

But that number needs context.

First, make sure we understand who is included in the child count.

Whenever possible, we want to understand the number of unique Bexar County children expected to benefit from this particular request—not simply the total number of children served by your organization or repeated encounters with the same children.

More importantly, cost per child is only one piece of information.

A lower cost per child does not automatically make one request stronger than another.

And a higher cost per child does not automatically make a request weaker.

Some services are intensive.

Some children require highly specialized support.

Some equipment is expensive but essential.

A program serving a relatively small number of children may make an extraordinary difference in their lives.

And some investments will continue benefiting children for many years.

So when we look at cost per child, we are also thinking about the depth of the need, the nature of the service, the impact and the long-term value of the investment.

The goal is not to produce the lowest cost per child.

The goal is to help us understand the relationship between:

**COST • IMPACT • VALUE**

## 7. Think Beyond the First Year

This becomes particularly important with longer-term investments.

A building improvement, playground, piece of equipment, technology system, classroom renovation or other capital investment may continue benefiting children for many years.

If that is true of your request, help us understand it.

How long is the item or improvement expected to remain in use?

How many children are expected to benefit each year?

Will it increase your capacity to serve children?

Is it replacing something? If so, how old is the item being replaced?

Are there ongoing maintenance, licensing or replacement costs?

Who will be responsible for those costs?

### How will the investment be sustained

Explain how your agency will keep the project, program, equipment or improvement operating and benefiting children after CBA funding has been spent. A long useful life is valuable only if the agency can support continued use.

What ongoing costs will be required? As applicable, include staffing, training, supplies, utilities, insurance, maintenance, repairs, software subscriptions, licensing and eventual replacement. Estimate the annual costs and identify who will be responsible for managing them.

How will those costs be paid? Identify the expected funding sources and distinguish resources already committed or included in the operating budget from funding you still need to raise. Explain whether continued operation depends on future grants, additional CBA support or other funding that has not yet been secured.

What is your plan if expected funding does not materialize or costs increase? Describe how you would protect the benefit to children, and identify any maintenance, reserve or replacement plan appropriate to the investment.

For equipment and facility improvements, explain who will maintain the asset and how upkeep and eventual replacement will be funded. For programs, explain how staffing and service delivery will continue after the initial funding period, or describe a planned end date if the program is time limited.

At the LOI stage, follow the questions on the LOI form. Agencies invited to continue should be prepared to provide sustainability details during application review, proportionate to the size and nature of the request.

Imagine, for example, a playground serving 200 children annually and expected to remain in use for 10 years.

Looking only at the first-year child count does not tell the entire story.

The same may be true for a building improvement, therapy equipment, technology, classroom furnishings or another long-term investment.

We are not asking you to create a complicated lifetime cost-per-child calculation.

We are asking you to help us understand:

Who benefits now?

and

Who is likely to benefit over the useful life of the investment?

That allows us to consider cost, impact and long-term value together.

## 8. Show Us the Request Is Ready

A strong idea and a real need are important.

We also need to understand whether there is a realistic path to carrying the request out. Much of this information is considered during application review rather than at the initial LOI stage.

Depending on the project, that might mean understanding:

- the scope; • realistic costs; • bids or estimates; • necessary approvals or permits; • the timeline; • other funding required to complete it; and • the organization's ability to carry the project through. This does not mean everything must already be completed or fully funded before you apply.

It means we should be able to answer:

Is there a realistic path forward?

If your project cannot begin until you reach a particular funding threshold, tell us.

If another major piece of funding is still pending, tell us.

If an approval or permit is still needed, tell us.

Again, context helps us understand the request.

## 9. Help Us Understand Cost: Bids & Quotes

For purchases, equipment, construction and other significant expenses, we need enough information to understand how the proposed cost was determined.

Detailed bids, bid comparisons and explanations are not required at the LOI stage unless specifically requested. These become relevant for agencies invited to continue when applicable to the request.

Where bids or quotes are required, they should allow us to make a meaningful comparison.

### When Bids Differ Significantly

Sometimes two bids for what appears to be the same project come back at very different amounts.

When that happens, it can be difficult for the committee to understand the reason.

Are the vendors proposing the same scope?

Does one include work that the other does not?

Are different materials or specifications being proposed?

Is there another reason for the difference?

If your bids differ significantly:

Help us understand why.

A third bid is not currently required simply because two bids differ significantly.

However, when reasonably available, another comparable bid can be helpful in giving the committee additional context about the expected cost.

If another bid is not practical, tell us that too.

### Sometimes Comparable Bids Aren't Available

Not every purchase fits neatly into a competitive bidding process.

Specialized equipment, proprietary technology or highly specific services may have only one qualified or appropriate vendor.

If that is the case:

Tell us why.

The goal is not to make agencies do unnecessary work.

The goal is to give us enough information to understand the proposed cost and feel confident in the request.

## 10. Tell Us What CBA's Funding Makes Possible

This is an important distinction.

There is a difference between telling us:

"This is an important project."

and helping us understand:

"This is what CBA's funding will allow us to do."

Would our funding complete the project?

Close a funding gap?

Allow the project to begin?

Fund a defined phase?

Increase capacity?

Replace equipment that is limiting services?

Make a needed repair possible?

Improve the safety or quality of services?

Help us understand CBA's role in the story.

## 11. If There Is More to the Story, Tell Us

An application can never anticipate every situation.

Sometimes there is information that does not fit neatly into a question on a form but is important for us to understand.

Maybe only one vendor can provide the equipment.

Maybe two bids look very different for a legitimate reason.

Maybe another funder has restricted its dollars to one part of the project.

Maybe the work has to happen during a particular window.

Maybe your annual child count does not capture the long-term reach of the investment.

Maybe the project is one phase of a much larger plan.

Maybe nothing can begin until a certain funding threshold is reached.

If there is something we need to understand:

Tell us.

Don't leave the committee to guess.

Sometimes a short explanation provides exactly the context we need.

## Understanding the Competitive Process

CBA receives more eligible requests than we are able to fund.

That means:

**ELIGIBILITY IS THE STARTING POINT.**

An eligible request is not necessarily a competitive request.

We consider each request on its own merits, but we also have to consider it in the context of the other requests before us and the resources available.

No single number or factor determines whether a request advances or receives funding.

The organization serving the most children does not automatically have the strongest request.

The project with the lowest cost per child does not automatically have the strongest request.

The largest or smallest request does not automatically have the strongest request.

A project serving fewer children may create a profound impact for those children.

Another project may reach a very large number of children.

One may address an immediate need.

Another may create value that lasts for 15 or 20 years.

So we look at the whole request:

Who are the children?

What is the need?

What are you asking us to fund?

What will change?

What does it cost?

Is the amount reasonable in context?

Is the request ready?

Does the investment have long-term value?

Can the agency sustain the investment and its benefit to children after CBA funding has been spent?

What other funding exists?

Could partial funding accomplish something meaningful?

And ultimately:

What will CBA's funding make possible?

## Before You Submit

Before submitting your LOI, consider giving it to someone who is not closely involved in the project.

Ask that person whether they can tell you:

Who are the children?

What is the need?

What exactly are you asking CBA to fund?

What does the entire project/request cost?

How much are you asking CBA to fund?

How many unique Bexar County children are expected to benefit from this particular request annually?

Could a meaningful portion move forward with partial funding?

What will change for children if the request is funded?

If those answers are clear to someone outside your organization, there is a good chance they will be clear to us too.

## A Few Final Thoughts

Be specific.

Clear information is more useful than broad descriptions.

Give us context.

Do not assume we know what you know.

Focus on the request.

We want to understand your organization, but the LOI is primarily our opportunity to understand the specific request before us.

Explain unusual circumstances.

If something does not fit neatly into the application, tell us why.

And throughout the process, keep coming back to:

**THE CHILD → THE NEED → THE REQUEST → THE IMPACT**

Our goal is not to make applying for a CBA grant more complicated.

In fact, it is the opposite.

We want to make sure we are asking for the right information at the right time.

At the LOI stage, we need enough information to make a sound first-stage decision without asking every agency to complete the work of a full application before knowing whether it will advance.

If your request moves forward, the full application gives us the opportunity to learn more.

The LOI gives us the opportunity to understand why we should.