

# **From Application to Award: Tools, Tips, Responsibilities, and Common Pitfalls**



**2026-2027**

For informational purposes only. Not a guarantee of funding.  
Requirements apply only to the 2026–2027 grant cycle.

# Welcome & Session Purpose



## Welcome and thank you for joining

- **This session is designed for:**
  - Jack and Jill of America, Inc. Chapters
  - Tax-exempt 501(c)(3) nonprofit organizations
    - those with a fiscal sponsor with a 501(c)(3) designation
    - those that are public agencies, including school districts
- **Today's goals:**
  - Understand available grant opportunities
  - Learn how to prepare a strong application
  - Understand responsibilities *after* a grant is awarded
  - Avoid common mistakes that delay or disqualify funding

# Grant Opportunities

## Two Types of Foundation Grants

### Chapter Grants

- Reading Corner
- Heart and Mind Health and Wellness Chapter

### Independent Grants

- Heart and Mind Health and Wellness Agency
- Our Village
- College Prep
- STEM



# Who Is the Grantee?



- **This distinction is critical**
- **Chapter Grants**
  - The Chapter is the *Grantee*
  - The Chapter manages funds, reporting, and compliance
  - Partner organizations do *not* receive funds directly
  - Nonprofit organizations are not eligible to apply
- **Independent Grants**
  - The nonprofit organization is the *Grantee*
  - Nonprofit organizations receive funds directly
  - Chapters are not eligible to apply

# Application Rules & Limits

- Applicants may apply to more than one grant category, if eligible
- Only **one application per grant category**
- No limits on:
  - Prior grant awards
  - Number of times an organization may apply
- Applications cannot be revised after submission without grants team assistance

# Before You Apply – Leadership & Accountability



## Ask these questions before applying:

- Who is accountable for leading the project?
- Who will submit the application?
- Who will manage purchasing, receipts, and reporting?
- What is the backup plan if a key leader transitions out?

## Strong applications show clear ownership.

The Foundation will only contact the individual listed in your grant portal's **Profile** area, so please keep the Chapter or Organization **Profile** updated.

# Compliance Requirements

- Chapters must include their 501(c)(4) number  
<https://www.guidestar.org/>
- Nonprofits must include their tax-exempt EIN, Letter of Determination from the IRS & be in good standing with the IRS  
<https://apps.irs.gov/app/eos/>
- Chapters and members may not benefit financially
- Review the Foundation's list of disqualifying budget expenses – found in each application

# Program Timeline & Grant Cycle Rules

- Grant spending period: **June 1 – May 31**
- Funds may not be used:
  - Before June 1
  - After May 31
  - Outside the awarded grant cycle
- **Plan your program timeline accordingly.**

# Budget Planning & Funding Readiness



- Use the Foundation's required budget template
- Request funding aligned with realistic program costs
- Consider:
  - Inflation
  - Unexpected expenses
- Determine if additional funding sources are needed
- Ensure all expenses are allowable

# Blank Budget Template

A	B	C	D	E	F	G	H
<b>Jack and Jill of America Foundation Grant Proposal Budget Template</b>							
<b>Itemized Project Budget</b>							
Chapter Name:				Date:			
Agency Name:				Foundation request total: \$0			
Under COSTS, list specific project components and the cost of each.							
Under SOURCES OF FUNDING, list the sources of funding for each component and indicate whether those funds are pending, committed, or secured; and whether they are cash or in-kind. Show how project revenues are allocated to costs.							
<b>COSTS (Expenses)</b>				<b>SOURCES OF FUNDING (Revenue)</b>			
Item List each project component	UNIT COST	# UNITS	Item cost (quote or estimate)	Foundation request	Other funding	Other sources of funding - Name and list each source of revenue for each item.	Indicate whether revenue is pending, committed, or secured; whether cash or in-kind.
			\$0				
			\$0				
			\$0				
			\$0				
			\$0				
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			\$0				
			\$0				
			\$0				
<b>TOTALS</b>			\$0	\$0	\$0		

All applicants are required to include a **project budget** with their application. Applicants must use the **Foundation’s official budget template** to complete this requirement.

To do so, applicants should:

1. Download the **blank budget template** from within the application.
2. Complete all required fields in the template.
3. Upload the completed budget to the **“Upload Your Completed Project Budget Form”** field in the application.

Applications submitted without a completed Foundation budget template will be considered incomplete.

# Budget Completion Instructions

## Completing the Foundation Budget Template

### General Information

- **Chapter Grant Applicants:** Enter your **Chapter name** in the *Chapter Name* field.
- **Independent Grant Applicants:** Enter your **organization's name** in the *Agency Name* field.
- Enter the **current date** in the *Date* field.
- In the **Foundation Request Total** field, enter the **total amount of funding requested from the Foundation**.
  - This amount **must not exceed the maximum award amount** for the grant category.

### Cost Expenses Section

For each budgeted expense:

- Enter the expense name in the **Item** column.
- Enter the cost per unit in the **Item Cost** column.
- Enter the number of units in the **# Units** column.
- The template will automatically calculate the **total line-item cost**.

### Sources of Funding (Revenue)

#### Foundation Request Column

- Enter the amount of **Foundation grant funding** requested for each expense.
- The total of this column **must match** the *Foundation Request Total* field.

#### Other Sources of Funding Column

- Use this column if an expense is **not fully covered by Foundation funding**.
- Enter the amount to be covered by **non-Foundation funding**.
- Identify the funding source and indicate the status: **pending, committed, secured, cash, or in-kind**

### Final Check

- The **Foundation Request total plus Other Sources of Funding total must equal the Item Cost total**



# Submission Tips



- Applications are submitted through WizeHive Zengine (Submittable)  
<https://jackandjillfoundation.org/how-to-apply/>
- Submission is a **2-step process in WizeHive Zengine (Submittable)**
- Applications are *not* complete until:
  - All required “\*” sections are filled out
  - The green “**Submit**” button is clicked

# If You Are Awarded a Grant

## Grant Acceptance

- Grants must be accepted by **June 15**
- Must complete and submit the Grant Agreement and ACH banking form – with voided check or letter from bank
- **For Chapter Grantees:** Please use your operating account for grant disbursements. Consult your Treasurer for guidance
- Failure to accept on time may result in revocation

# Grant Funding Disbursement Schedule



- **50%** upon grant acceptance and program start
- **30%** after submission of:
  - Required preliminary report
  - Receipts for the initial 50%
- **20%** after submission of:
  - Final report
  - All remaining receipts
- **All** disbursements are made via ACH

# Reporting & Accountability

- Reports and receipts are required and time-sensitive
- Late or missing reports may result in:
  - Grant revocation
  - Ineligibility for future grants
- Unspent funds must be returned to the Foundation by June 30

# Grant Cycle Timeline



- **Application Phase**
- Grant applications open **Jan 1** and close **Mar 15**
- **Award Notification**
- Applicants are notified of funding decisions on **May 15**
- **Grant Acceptance**
- Must accept award by **June 15**
- **Program & Spending Period**
- **June 1 – May 31**
- All eligible expenses must fall within this window
- **Reporting & Disbursements**
- 50%: Upon acceptance and program start
- 30%: After preliminary report and receipts
- 20%: After final report and all receipts
- **Grant Closeout**
- All funds spent by **May 31** or returned by **June 30**

# Common Pitfalls to Avoid

- Unclear project leadership
- Unrealistic budgets
- Misunderstanding who the Grantee is
- Missing reporting deadlines
- Spending funds outside the grant cycle
- Failure to retain receipts

# Key Takeaways

- A Foundation grant is a **responsibility**, not just funding
- Plan as if you *will* be awarded
- Understand post-award expectations before applying
- Ask questions early and use Foundation resources



# Questions & Contact Information

- **Questions?**
- Grants Team: [grants@jackandjillfoundation.org](mailto:grants@jackandjillfoundation.org)
- Foundation Grants Website  
<https://jackandjillfoundation.org/grants/>

Thank you for your time and commitment to strong stewardship.