

Coalition Fiscal Sustainability Guide

Structured for Fiscal Sustainability

Fiscal sustainability for a coalition extends beyond grant funding; it requires establishing fiduciary relationships, having clear financial processes, regular reporting, and effective documentation management. It also involves diversifying funding sources and assessing the capacity to handle administrative and financial responsibilities.

Coalitions can apply for non-profit status with the IRS, typically as a 501c3. This requires creating bylaws, obtaining an Employer Identification Number (EIN), requesting federal tax exemption. Some groups may be required to file the Federal 990 tax form annually. Articles of Incorporation may also be filed with the Secretary of State. Obtaining an EIN can take up to a year, and it's advisable to consult a legal professional for assistance with bylaws.

Alternatively, coalitions may choose to partner with another organization as their fiscal agent, necessitating written documentation of roles and responsibilities, such as a Memorandum of Agreement or Contract. Coalition leaders should also obtain conflict of interest disclosures from fiscal agents and members.

Considering Funding Other Than Grants

Healthy coalitions can operate like businesses by providing valuable services to meet community needs. Key funding sources include:

- **Donations:** Accept donations efficiently, both online and at events, and track them for IRS regulations.
- **In-kind Support:** Record non-monetary donations like volunteer time or meeting space.

- **Fundraising Events:** Organize engaging community events that connect with your mission and ensure they are profitable. Check with the Michigan [Charitable Gaming Division](#) of the Michigan Lottery for special rules about raffles.
- **Pledge Drives:** For large purchases, set realistic goals and maintain community engagement through reminders.
- **Membership Dues:** Consider the equity of dues and clarify member benefits.
- **Fees for Services or Products:** Charge for training or products while managing logistics.
- **Long-term Investments:** Consult with financial advisors for property management and investment strategies.

Diversifying funding sources and combining short and long-term strategies is essential for sustainability.

Table of Potential Funding Sources

The table below contains different funding sources along with a brief description, how to access, and types of uses for the funding source. The table is split up into Local, State, and National funding sources. Timeframes related to when to apply and how often are included, when available, in the “How to Access” column. All the funding sources listed below are available to coalitions. Eligibility criteria may change based on each funding sources’ evolving projects and priorities.

<u>LOCAL</u> Funding Source Name	Brief Description	How to Access	Types of Uses
Community Reinvestment Act Local banks	The Community Reinvestment Act (CRA) was passed by Congress in 1977 to encourage deposit-taking banks to reinvest in the communities where they	Research your local banks’ publicly available Community Reinvestment Act Performance Evaluation. Identify the bank you would like to work with.	Community development loans, community development investments, and community development services. A community development loan,

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	operate. The law was passed to combat “redlining” – a practice where banks would not issue loans in neighborhoods with high populations of people of color or low- and moderate-income (LMI) residents. Significant updates were made in 2023. Look at your local bank’s publicly available CRA Performance Evaluation for more information.	Schedule an appointment with the branch manager to establish a relationship before you discuss your proposal.	community development investment, or community development service is a qualifying activity if it provides financing for or supports community support services which means activities, such as childcare, education, workforce development and job training programs, health services, and housing services, that partially or primarily serve or assist low- or moderate-income individuals or families
Nonprofit Collaboratives	Many Nonprofits and Area Foundations offer collaborative opportunities from sharing office space to cooperative agreements where several small organizations can pool resources to contract with professionals on strategic planning, marketing, financial management, etc.	Each coalition or collaborative body will have unique standards and ways to apply. Research any in your area. Ensure they are in good standing in the community, have a solid financial base, and clear policy and practices on any shared resources. Visit mnaonline.org or ask at your local chamber of commerce to find collaboratives near you.	Collaboratives are a great way to pool resources to meet common organizational needs.
Local Community Foundations and Clubs https://www.michiganfoundations.org/directory	Community foundations may have a special interest in funding projects that address locally identified priority needs. They may be independent, or part of a national/international	Find a member of a local club or foundation and ask about how to seek funds. Most will expect a brief presentation to members along with a fairly simple	Projects covered vary widely.

LOCAL Funding Source Name	Brief Description	How to Access	Types of Uses
	network such as the Lions or Rotary Clubs.	written form and a Tax Identification Number (TIN).	
United Way https://www.unitedway.org/find-your-united-way/	United Way is a leading International charity that fights for health, education, and financial stability for every individual in every community. United Way seeks to improve lives by mobilizing the caring power of communities around the world to advance the common good.	Contact your local United Way chapter and identify resources available. Build a relationship for lasting impact.	Projects covered vary widely.
Chain Stores and Chain Store Corporate Foundations (Chick-Fil-A , McDonalds, CVS, Walmart, Home Depot, Laz-e-Boy)	Chain Store corporate foundations are more likely to offer individual or organizational scholarships. Many local chain stores can offer \$50-\$100 gift cards for a school program or 501c3, however these funds are often exhausted early in the calendar year.	Chick-fil-A corporate grants are typically awarded once per year and range from \$30,000 to \$350,000. Visit website to apply. Laz-e-Boy Foundation is limited to 501c3 registered organizations within 30 miles of one of their stores. Talk with your local chain store managers about ways they can support your mission.	Chick-fil-A supports a variety of proposals. Many chain stores can offer food donations, kids bicycles and helmets, building supplies, free activity classes, gift cards, etc.
Utilities Companies (WEC Energy Group , Consumers Energy , DTE)	Most utilities participate in corporate giving and limit community grants to organizations with 501c3 status serving only those in their service area.	Visit each website. Typically limited to one application per year. Amounts range from \$1,000 to \$50,000 or more. DTE Foundation grant applications are accepted by	Community and neighborhood development, Arts and culture, Health and human services, Education, Environment

LOCAL Funding Source Name	Brief Description	How to Access	Types of Uses
		invitation-only. Contact the DTE Foundation.	
United States Department of Agriculture Rural Development https://www.rd.usda.gov/programs-services/all-programs	We are committed to helping improve the economy and quality of life in rural America.	Contact your local RD office . Priority given based on population and median household income (small communities 5,500 or less, median household income below 80% of state nonmetropolitan median household income) Grants and Loans are sometimes combined, grants are limited to 75% of proposed project cost. That means at least 25% of your proposed budget needs to be supplied by another funding source.	Projects covered vary widely but some grants address the following: strategic planning, leadership training, access to housing (including repairs), water, telemedicine, food, healthcare.

STATE Funding Source Name	Brief Description	How to Access	Types of Uses
Michigan Municipal League https://mmlfoundation.org	MML hosts The MI Funding Hub which is a joint venture of The Michigan Municipal League and The Michigan Department of Labor and Economic Opportunity. MI Funding Hub is a free program to help your community track and apply for funding, get one-on-one technical assistance, and access tools for becoming more grant savvy.	Email the MI Funding Hub helpdesk at helpdesk@mifundinghub.org . A team member will reply via email with an intake form to gather basic information about the applicant community and project priorities. From there, our team will schedule a meeting with your community to provide basic coaching and discuss how to meet your funding needs.	Funding covers projects from infrastructure needs, economic development, housing, water, transportation, and workforce development.
Michigan State Police: Byrne JAG Grants https://www.michigan.gov/msp/divisions/grantscommunityservices/byrne-jag-and-rsat/program-descriptions	This program area is designed to foster proactive, positive interaction among criminal justice agencies, local organizations, and the communities they serve. MSP funds these programs through asset forfeiture. Annually, these range from over 9 to 14 million dollars between 2019- 2024.	Application typically open at the end of June on Byrne JAG Grants website .	Community engagement events, educational academies, programming for criminal justice community education, drug/violence prevention, reentry, mental health, and mentoring.

NATIONAL Funding Source Name	Brief Description	How to Access	Types of Uses
US Dept of Justice https://www.ojp.gov/funding/explore/overview	Annual funding opportunities to enhance community safety and trust. In May 2021, DOJ revised Project Safe Neighborhoods' approach to emphasize four key design elements of successful violent crime reduction initiatives: community engagement, prevention and intervention, focused and strategic enforcement, and accountability.	Register in grants.gov then complete application in https://justgrants.usdoj.gov/ Applications typically open year-round.	Community-based approaches to address community safety, violent crime, co-occurring SUD with Mental Health Disorder, Overdose Fatality Review Teams.
Housing and Urban Development: Community Development Block Grant Programs https://www.hudexchange.info/programs/cdbg/	Annual awards from congregational appropriations. Community Project Funding, Recovery Housing, Neighborhood Stabilization, Community Development Block Grants	Community Projects are funded through congress. The Appropriations Committee created a new opportunity for Members of Congress to direct federal resources for certain projects with demonstrated community support, commonly referred to as Community Project Funding. Per Committee rules, each Member of Congress can submit up to 15 projects for consideration to be funded within the Fiscal Year (FY) appropriations bills.	Economic Development Initiative (EDI) Community Project Funding (CPF) grants provide investment in a wide variety of projects such as housing, homelessness prevention, workforce training, public facilities, parks, resilience planning and other critical infrastructure and services.
WK Kellogg Foundation	The W.K. Kellogg Foundation supports children, families and communities as they	Ensure your values match their values. Set up a free account on	Good food, strong and equitable food systems; Good health and health equity; Good early care

https://www.wkkf.org/grantseekers/	strengthen and create conditions that propel vulnerable children to achieve success as individuals and as contributors to the larger community and society.	Kellogg Foundation's Fluxx grants management system .	and education; Good jobs and employment equity
Kresge Foundation https://kresge.org/grants-social-investments/current-funding-opportunities/	The Kresge Foundation is a private, national foundation that works to expand equity and opportunities in America's cities through grantmaking and social investing in arts and culture, education, environment, health, human services and community development.	Submit a Letter of Inquiry through their detailing your organization and the proposed work. Create a free account on Kresge's Fluxx grants management system .	We help create pathways for people with low incomes to improve their life circumstances and join the economic mainstream.
Chain Stores and Chain Store Corporate Foundations (Chick-Fil-A , McDonalds, CVS, Walmart, Home Depot)	Chain Store corporate foundations are more likely to offer individual or organizational scholarships. Many local chain stores can offer \$50-\$100 gift cards for a school program or 501c3, however these funds are often exhausted early in the calendar year.	Chick-fil-A corporate grants are typically awarded once per year and range from \$30,000 to \$350,000. Visit website to apply . Talk with your local chain store managers about ways they can support your mission.	Chick-fil-A supports a variety of proposals. Many chain stores can offer food donations, kids bicycles and helmets, building supplies, free activity classes, gift cards, etc.
United States Department of Agriculture Rural Development https://www.rd.usda.gov/programs-services/all-programs	We are committed to helping improve the economy and quality of life in rural America. Programs for communities include Develop a community economic plan, Expand/improve community	Contact your local RD office . Priority given based on population and median household income (small communities 5,500 or less, median household income below 80% of state	Projects covered vary widely but some grants address the following: strategic planning, leadership training, access to housing (including repairs), water, telemedicine, food, healthcare.

	facilities & services, Build out or upgrade water treatment facilities	nonmetropolitan median household income) Grants and Loans are sometimes combined, grants are limited to 75% of proposed project cost. That means at least 25% of your proposed budget needs to be supplied by another funding source.	
Department of Labor Workforce Development https://www.dol.gov/agencies/eta/grants/apply/find-opportunities	Strengthening America's workforce	Visit their website for eligibility criteria and open applications. Often several applications are available throughout the year.	Many grants serve justice-involved youth, youth, young adults through training in in-demand industries, leadership development, mentorship, and employment and/or education
Administration on Children and Families https://www.acf.hhs.gov/grants#quick-link	ACF is a section of the Department of Health and Human Services focused on developing support for children and families.	A wide variety of grant opportunities accessible throughout the year on grants.gov	A wide variety of activities are covered.
Health Resources and Services Administration (HRSA) https://www.hrsa.gov/grants/find-funding	HRSA exists to serve communities and people who need it most and support the health workforce, health systems, and facilities. It includes bureaus or offices that specialize in rural health policy, HIV/AIDS, maternal & child health, health workforce, primary health care, health systems.	Visit their website for eligibility criteria and open applications.	Funding goes to organizations, local or state governments to address "critical needs in their community" recently identified priorities include care for people with AIDS, healthcare workforce shortages, FASD Screening.
National Institutes of Health (NIDA, NIMH,	NIH is within the U.S. Department of Health and	A wide variety of grant opportunities accessible	A wide variety of activities are covered.

NIMHD, NIAAA and more)	Human Services and focuses primarily on research seeking to enhance life, and to reduce illness and disability.	throughout the year on grants.gov	
U.S. Centers for Disease Control and Prevention (CDC) https://www.cdc.gov/grants/index.html	CDC addresses issues around diseases and conditions; healthy living; workplace safety; environmental health; injury, violence and safety; global health; travelers' health and more.	A wide variety of 1-5 year grant opportunities accessible throughout the year on grants.gov	Research and non-research public health programs that advance the agency's public health mission domestically and abroad to keep Americans safe and healthy where they work, live and play.
Substance Abuse and Mental Health Services Administration (SAMHSA) https://www.samhsa.gov/grants/grants-dashboard	The Substance Abuse and Mental Health Services Administration (SAMHSA) is the agency within the U.S. Department of Health and Human Services that leads public health efforts to advance the behavioral health of the nation. The majority of funding to address substance use disorder (SUD) is managed through this federal program.	A wide variety of grant opportunities accessible throughout the year on grants.gov .	A wide variety of activities are covered.
Office of White House Drug Control Policy	This is the organization that announces CADCA's Drug Free Community (DFC) grants, High Intensity Drug Trafficking Areas Program (HIDTA), Combating Overdose through Community-Level Intervention (COCLI)	Information about grant opportunities may be found https://www.whitehouse.gov/on-dcp/grant-programs/ but applications are managed through different processes. DFC applications typically open in February. HIDTA applications are accepted throughout the year and reviewed at least once	Requires an interdisciplinary collaborative effort focused on reducing the impact of substances.

		per year. COCLI applications typically open in October.	
Robert Wood Johnson Foundation https://www.rwjf.org/en/grants.html	Focus on health equity.	Grant cycles frequently throughout the year. Check their website for open opportunities.	Health Policy Research & Education, Economic Inclusion, Caregivers and Families, Housing Policy, Community Power to Advance Health Equity, Infrastructure, Community Development, Health Disparities, Social Determinants of Health, Healthcare Access & Coverage, Public & Community Health

Things to Prepare Before Applying for Federal Funding:

- [System for Award Management \(SAM\) Account](#): Registration is free but involves several steps, so it's advisable to start at least a month before your application deadline. You can find more information and register here.
- Commercial And Government Entity (CAGE) Code: This five-character alphanumeric code is automatically generated when you create your free SAM account. It will renew when you renew your SAM account or will expire every five years, so be aware of your expiration date.
- [Unique Entity Identifier \(UEI\)](#): You need to complete a free registration for a SAM account, during which a UEI will be issued. Remember to renew your UEI annually, starting the renewal process at least 30 days before it expires to prevent any delays in federal funding.
- Tax Identification Number (TIN): This nine-digit number can be one of the following:
 - Social Security Number (SSN): Managed by the [Social Security Administration \(SSA\)](#).

- Employer Identification Number (EIN): Issued by the Internal Revenue Service for tax administration purposes. You can apply for an EIN [with the IRS](#).
- Individual Taxpayer Identification Number (ITIN): Provided by the IRS to individuals who need a U.S. taxpayer identification number but do not have an SSN.
- [Data Universal Numbering System \(DUNS\) Number](#): Assigned by Dun & Bradstreet, a commercial entity contracted by the federal government to provide this publicly shareable number.
- Organizational Budget: The Kresge Foundation offers a Sample Organizational Budget available on their [grants support page](#).

Things to prepare before applying for funding through Michigan Department of Health and Human Services (MDHHS):

Electronic Grants Administration & Management System (EGrAMS) is the system designed to aid users throughout the grants process. To set up an account, visit <https://egrans-mi.com/mdhhs/user/home.aspx>

Things to prepare after you have read the Notice of Funding Opportunity (NOFO), application guidance, and participated in any Q & A or informational sessions:

- Proposal Budget: Summarize expected expenses and ask the grants contact for submission format. For guidance, you can watch the ["Budgeting for Grants 101" video](#) provided by the Michigan Department of Health and Human Services (MDHHS). If applicable, include an [Indirect Costs Rate](#).
- Health Disparity Impact Statement: Detail any health disparities that your proposal aims to address. Guidance is available through the Substance Abuse and Mental Health Services Administration (SAMHSA). This statement will be mandatory for grants from SAMHSA, MDHHS, and the Prevention Network starting in 2024. More information can be found on the [SAMHSA website](#).

- Work Plan: Outline the participants, timeline, resources, goals, activities, and evaluation methods in your work plan. Ensure that it aligns with community needs and the purpose of the grant.
- Letters of Support: Obtain letters from partner organizations to strengthen your proposal. Include details about the relationship and specific commitments made. It's advisable to provide at least two weeks' notice for requests.

For Michigan organizations addressing Substance Use Disorder (SUD), you can request a Letter of Support from the Prevention Network. Review the [guidance provided on grantboost](#) and submit your request to info@preventionnetwork.org, including the response deadline. More details can be found at Prevention Network.

Notes on Financial Audits and Reviews

There should be internal and external accountability for your organization's finances. Internal accountability is entirely up to you. External accountability is provided by both the state and federal governments. Federal requirements for financial audits are included in the Code of Federal Regulations (CFR.) If you've ever received a Federal grant or cooperative agreement, then you should be familiar with the Office of Management and Budget's Uniform Guidance found at [2 CFR 200](#). The guidance was created to streamline the Federal government's guidance on Administrative Requirements, Cost Principles, and Audit Requirements for Federal awards.

If your organization receives more than \$750,000 you are required to complete a financial audit. The National Council of Nonprofits offers additional guidance on their [website](#). The requirements are different for federal reporting than for state reporting. In Michigan, "A charitable organization with annual contributions of \$500,000 or more must file an audited financial statement prepared by an independent

CPA. A charitable organization with annual contributions less than \$500,000 and at least \$250,000 must file a financial statement that is either reviewed or audited by an independent CPA.” (councilofnonprofits.org)

Other Helpful Information

SAMHSA’s [Grants Terminology Glossary](#)

Linked Resources

IRS.gov Acknowledgements of charitable contributions <https://www.irs.gov/charities-non-profits/charitable-organizations/charitable-contributions-written-acknowledgments>

System for Award Management Homepage <https://sam.gov/content/entity-information>

Social Security Administration Homepage <https://www.ssa.gov/>

IRS.gov EIN guidance <https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>

Dun & Bradstreet Homepage <https://www.dnb.com/duns.html>

Kresge Foundation Sample Organizational Budget <https://kresge.org/wp-content/uploads/SampleBudgetSheet.pdf>

EGrAMS Homepage <https://egram-mi.com/mdhhs/user/home.aspx>

MDHHS Budgeting for Grants <https://youtu.be/4T4GfLyUEFA>

Guidance for letters of support <https://www.grantboost.io/blog/Letters-of-Support/>

National Council of Nonprofits <https://www.councilofnonprofits.org/running-nonprofit/nonprofit-audit-guide/what-review-or-compilation>

SAMHSA Grants Terminology Glossary <https://www.samhsa.gov/grants/grants-glossary>

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