



Chicago Area Chapter

GRANT SUCCESS CONFERENCE 2024

Friday, April 26, 2024 | 10:00 AM – 4:00 PM

Impact House, 200 W. Madison Street, Chicago

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April 26, 2024

LETTER FROM THE PRESIDENT

Dear Friends and Colleagues,

Welcome to the 2024 GrantSuccess Conference!

This premier event of the Chicago Area Chapter of the Grant Professionals Association (GPA) is our annual conference designed for colleagues and allies across the philanthropic sector. A spectacular day has been planned just for you!

Thank you for responding to the invitation to engage with a diverse gathering of some of the region's key thought-leaders and change-makers. Through our presenters and panel, we will be challenged to make today personal, to wrestle with the uncertainty and unpredictability of present day funding trends, to embrace community-centered partnerships and to demystify the business and budgets of grant-seeking. You will find the most value in committing to participate in the interactive sessions, asking questions or engaging in discussions with tablemates.

Through our sponsors you will be introduced or reintroduced to tools and opportunities to enhance your work in the industry. Be sure to visit with them, the QR codes and the goodie bag to learn more. Remember, you may also help select the chapter's Book Club read for this fall by stopping by the GPA table and casting your vote!

Your presence here today is affirmation of many months of planning by our dedicated program team, board and volunteers. We express our deepest gratitude for their tremendous effort. Please feel free to share your appreciation or concerns with them as you encounter them throughout the day. Also, your evaluation form response is critical in helping lay the groundwork for our 2025 event. So, please make time to share your experience and recommendations with us when you receive our post-event email with links to resources and recordings.

So once again, thank you for making time to be here, because it wouldn't be the same without you. May you make new friends, reconnect with existing ones, experience learning and share your wisdom, enjoy the refreshments, renew your passion and carry back actionable insights to transform your world.

Embrace the day!

Yvonne White-Morey, RSM
GPA Chicago Area Chapter President
Chicago, IL

Scan the code to download
session handouts and fill out
the conference evaluation.



Thank you!



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CONFERENCE SCHEDULE

Full attendance at this conference qualifies
for 4.5 CEUs for GPC/CMP credits.



9:30–10:00 am Registration, Exhibit Hall, Connections,
Continental Breakfast

10:00–10:15 am Welcome

10:15– 11:45 am **KEYNOTE: The Mission-Centered Grant Professional:
Connecting the Power of Your Passion and Purpose**
Maryn Boess, *GrantsMagic U*

11:45 am–1:15 pm Luncheon & Connections

12:15–1:15 pm **FUNDERS PANEL DIALOGUE:
Charting an Uncharted Territory:
Understanding Our New Era of Funding**

Moderator: Yusef Garcia, Founder & Principal,
Monarq Advisors

Panelists: • Adam Arents, Vice President and Program Officer,
IMC Foundation

• Caroline McCoy, Vice President of Programs,
Woods Fund Chicago

1:15–1:30 pm Break & Connections

1:30–2:30 pm **CONCURRENT SESSIONS I**

Room A • **Inside the Funder's Black Box: What Really Happens to
Your Proposal After You Push "Submit"** | Maryn Boess

Room B • **Creating The Perfect Grant Budget: Three Key Lessons
You Don't Want to Miss** |
Dale Asis, *Little Village Environmental Justice Organization*

2:30–2:45 pm Break & Connections

2:45–3:45 pm **CONCURRENT SESSIONS II**

Room A • **Meaningful Engagement: A Transformational Approach
to Outreach** | Laura Stukel, *TeamSage*

Room B • **The "Other Side": Lessons from the For-Profit World**
Lewis R. Jones, *Consultant*

3:45–4:00 pm Conference Wrap-Up

Participation in the full
conference earns 4.5 CEUs
toward GPC/CMP renewal.

Scan the code to download
session handouts and fill out
the conference evaluation.



Thank you!

GRANT SUCCESS 2024

SPEAKER BIOS



Maryn Boess

KEYNOTE



Over her 35+-year career in the nonprofit world, Maryn has been an on-staff program developer and grantwriter; an independent grants consultant (winning more than \$42 million for her clients over 10 years); a grants project manager; a grants trainer; a grants reviewer, author, speaker, mentor and coach; and - **starting in 2006 - even a grantmaker.**

This done-it-all background gives her the **unique 3-D "insider's" perspective** she brings to the practical and inspiring trainings on healthy, successful grantsmanship that she has been blessed to share with thousands of non-profits of every size, nationally and internationally as well.

GrantsMagic U, launched in fall 2015, is the "virtual academy" she created to make her extensive portfolio of grantsmanship trainings available (and affordable!) for anyone, anytime, anywhere. GrantsMagic U's global student community now includes over **45,000 people from at least 34 countries**, including all 50 U.S. states, DC, Puerto Rico, Guam, and the Virgin Islands. GrantsMagic U is an Approved Continuing Education Provider for both the Grant Professionals Certification (GPC) and Certified Fund-Raising Executive (CFRE) credentials. GrantsMagic U is also one of the original "Approved Trainers" for the Grant Professionals Association.

Starting in 2006 Maryn has also been **"in the grantmaker's chair,"** managing up to \$2 million annually as a grantmaker for K-12 education in the U.S. Southwest. She considers herself a dual citizen in the grants world, and may be the only person to hold simultaneous membership in both GPA (Grant Professionals Association, for grantseekers) and GEO (Grantmakers for Effective Organizations, for grantmakers).

In 2020, in recognition of her longstanding service and contribution to the grant profession, Maryn became just the second person ever to be inducted into the international **Grant Professionals Class of Distinguished Fellows.**

SPEAKER BIOS



Adam Arents

Adam's brief experience as a grantwriter yielded a total of one grant for \$1,000 that he secured for a nonprofit early in his career, which he was pretty proud of at the time. After that, he worked in the Chicago Public Schools Partnerships Office before teaching English on a Fulbright grant in Russia and then developing new digital strategies at Rotary International. He's been supporting education and youth development across the Chicago area as a Program Officer for the IMC Chicago Charitable Foundation since 2016.



Dale Asis

Dale Asis is the Finance Director at Little Village Environmental Justice Organization. Dale is also the President of the Bayanihan Foundation Worldwide, a US registered public charity dedicated to promoting Filipino diaspora philanthropy. Additionally, Dale is the founder of two coalitions: The Coalition of African, Arab, Asian, European and Latino Immigrants of Illinois (CAAAELII) and United Congress of Community and Religious Organization (United Congress). In 2009, he established a network of over 150 diaspora donors in

Chicago that donate to over 50 countries worldwide. He earned his Master of Arts Program in Social Sciences (MAPSS) at the University of Chicago. He is currently teaching and completing his PhD at Loyola University Chicago. In 2007-08 he received a fellowship grant from the Chicago Community Trust Fellowship for Community Leaders. Mr. Asis also received the Ford Foundation Leadership for a Changing World Award. Over the last 18 years, Dale has spoken extensively on immigrant and diaspora philanthropy issues. He also provides capacity building and organizational consulting to many ethnic community organizations in Chicago.

SPEAKER BIOS

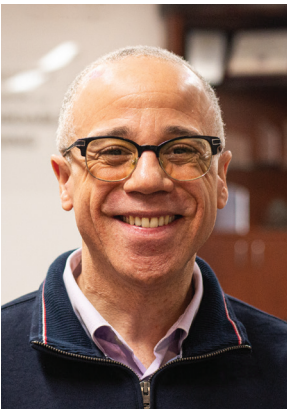


Yusef Garcia

Yusef Garcia's mission is to help build and transfer power, one relationship at a time. Currently, he serves as Founder and principal of Monarq Advisors, a people-centered advisory firm helping organizations and individuals successfully develop strategies that address their unique needs; such as transformative revenue generation, coaching for rising leaders, governance support, and convening.

Prior to embarking on Monarq Advisors, Yusef served as an executive non-profit leader (serving in philanthropic, intermediary, health + human services, and arts & culture spaces) architecting the development and implementation of contemporized fundraising, engagement, and partnership strategies. He also currently serves as Vice Chair-elect at AFC (AIDS Foundation of Chicago).

In addition to his passion for influencing change, Yusef is a trained chef, having graduated from the Culinary Institute of America in Hyde Park, NY. He also enjoys photography, travel, and Chicago House Music. He and his husband live in Chicago with their two pups.



Lewis R. Jones

Lewis R. Jones is a consultant who is an experienced nonprofit fund development professional who has given presentations throughout the United States, including a talk at Radio City Music Hall. He recently escaped the for-profit world after years as a leader in real estate management. Lewis is also an award-winning stage actor, director, and producer. He reminds anyone who thinks nonprofit work doesn't pay to try theatre work! Contact Lewis at [LinkedIn.com/in/lewisrjones](https://www.linkedin.com/in/lewisrjones).

SPEAKER BIOS



Caroline McCoy

Caroline McCoy's professional interests and passion include supporting community-driven strategies that influence equitable services, systems, and practices, and advancing racial justice in philanthropy. She currently serves as Vice President of Programs at the Woods Fund where she supports work that is advancing racial equity and economic justice through grantmaking.

Prior to joining the Woods Fund, Caroline was a Program Officer at the Robert R. McCormick Foundation, where she led the Foundation's place-based initiative in Englewood and its health and wellness funding strategy. She also managed relationships with corporate partners to help them achieve impact in their local communities.

Previously, Caroline was an Associate Director at Arabella Advisors where she supported family and individual clients to build and implement grant-making strategies across several issues. She also worked at the Ounce of Prevention Fund, where she supported advocacy efforts to improve services for young children and families in Illinois.

She holds a BA in political science with a minor in African American studies from the University of Illinois at Urbana-Champaign and a MS in public service management from DePaul University. She is a former ABFE Connecting Leadership Fellow and BMe Vanguard Fellow and serves on the Board of Directors for the Chicago Lawyers' Committee for Civil Rights, and the executive leadership team and Social Justice Committee Chair for Chicago African Americans in Philanthropy.

SPEAKER BIOS



Laura Stukel

Laura Stukel has deep expertise as a market transformation, stakeholder, and leadership consultant for the energy efficiency industry. Her project management and content experience led to successful outcomes in several public-private market transformation projects including efforts to increase consumer demand for energy efficiency by highlighting benefits throughout the sales process for residential homes. Laura uses a foundation of building performance

concepts, including climate requirements, whole home performance, and health and safety benefits to extend knowledge sharing from building scientists to the supporting program managers, contractors, community advocates and other leaders that engage with consumers to make home energy upgrades possible.

More recently, Laura has extended her work based on experience in working with the UN Sustainable Development Goals, and the Justice 40 initiative, particularly around the design of Community Benefit Plans and Market Transformation Plans.

Several high-profile projects include: project co-manager for U.S. Department of Energy Better Buildings Home Energy Information Accelerator; project and stakeholder manager and lead author for both the proof-of-concept blueprint resource, *Capturing the Sun: A Roadmap for Auto-Populating Solar Home Sale Listings* (U.S. Department of Energy Lawrence Berkeley National Laboratory, 2017); and the consensus building science definition resource, *Green MLS Implementation Guide* (National Association of Realtors, with Real Estate Standards Organization, 2014). Applying a model for social change ecosystems, Laura has expertise in recruiting, connecting, managing and leading cohorts to build knowledge and skills while solving market-based problems together.



KEYNOTE

The Mission-Centered Grant Professional: Connecting with the Power of Your Passion and Purpose

Maryn Boess
GrantsMagic U

What does the word “mission” mean to you as a practicing grant professional? Too many of us focus on the missions of the organizations we serve, and lose sight of the ways our work supports our own personal sense of purpose in the world.

In this experiential session, you’ll have the opportunity to step back from the details of what you do, and reflect on the why and how – Why the work is meaningful to you personally, and how to rediscover and stay connected with your passion and purpose.

Through a series of thoughtful discussions and individual and team exercises, you’ll be challenged to:

- Reflect on and articulate your personal mission – the direction of your path in life and the qualities you want to bring to the journey;
- Explore and clarify how your practice as a grant professional nurtures and furthers your pursuit of your personal mission; and
- Identify strategies for deepening your commitment to your work and staying profoundly grounded in your passion and purpose.

You will leave with a new understanding of the value of your work in the world; a renewed sense of commitment to your practice; and new take-away tools to help you stay mission-centered not just in your current position as a grant professional, but throughout your lifetime.

Be sure to download and/or print out the interactive
workbook that accompanies this session.





FUNDER PANEL

Charting an Uncharted Territory: Understanding Our New Era of Funding

MODERATOR: Yusef Garcia, Founder & Principal, *Monarq Advisors*

PANELISTS:

- Adam Arents, Program Officer, *IMC Foundation*
- Caroline McCoy, Vice President of Programs, *Woods Fund Chicago*

In this candid conversation, a panel of corporate and private foundation donors will review giving in 2023, which, according to the Chronicle of Philanthropy, generally fell by 10.5%, and discuss funding trends in 2024. We also aim to explore how we, as a sector, may create more sustainable partnerships in this new era, and discuss the trends that may help fund-seekers create stronger cases of support for renewed and future funding.

OUTCOMES OF DISCUSSION:

1. For audience to share their perspectives, trepidations, and insights from 2023, plus their vision for 2024 and beyond.
2. To learn from funding panel about key trends within the funding community, specifically how 2023 has affected their giving ("pulling back?") and their insights into funding trends/behaviors for 2024 and beyond.
 - How giving fared in 2023
 - How giving will fair in 2024
3. How might fund-seeking organizations prepare?
4. For audience to hear how election year, uncertain financial climate, changing strategies, and other factors may impact endowments and funding sources.
 - DEA: to share with audience the importance of helping organizations diversify their funding portfolios (major donors, etc)
5. For audience to gain a better outlook about how we pay partner differently, more effectively, etc. PLUS, share with funders what we're hearing and experiencing, as fund seekers.



CONCURRENT SESSIONS I

Inside the Grantmaker's Black Box: What Really Happens to Your Proposal After You Push "Submit"!

Room A

Maryn Boess, *GrantsMagic U*

Do you know what actually happens after you push "Submit" on your proposal? If you're like 98% of grantseekers, you've never seen the entire grants review and decision-making process in action, from start to finish. Which means you probably don't understand what really goes on after a proposal vanishes inside the Grantmaker's Black Box.

But what if you could hop inside a real-life grantmaker's decision-making process and get an up-close look at what goes on? What if you had an insider's view of the in-the-trenches challenges, stresses, frustrations, surprises, internal timelines, and twists and turns the grantmaking team experiences at each step of the way, as it works hard to invest this year's grant dollars wisely and well? Can you imagine how the insights and takeaways from this experience might give you an edge in your own grants success?

During this session, long-time grant professional and grantmaking program officer Maryn Boess will take you through an actual grants review and decision-making process which awarded a total of \$600,000.

You'll walk away with key insights you can put to use immediately on behalf of your nonprofit and community. And most importantly? You'll become part of the 2% with a funding edge because you know what goes on inside the Grantmakers' Black Box!

Creating The Perfect Grant Budget: Three Key Lessons You Don't Want to Miss

Room B

Dale Asis, *Little Village Environmental Justice Organization*

So, you nailed the grant narrative. How about the budget? Learn three insider secrets to bring your budget proposal to success. Learn how to apply a community-centered approach and use critical analysis in your budget proposal.

Learning objectives: You will learn how to apply a community-centered approach and use critical analysis in your budget proposal.



CONCURRENT SESSIONS II

Meaningful Engagement: A Transformational Approach to Outreach !

Room A

Laura Stukel, *TeamSage*

Grant professionals sometimes wear the hat of program designer, particularly when funding opportunities address a novel strategy. Driven by federal priorities such as the Justice 40 Initiative, we currently sit in such a moment. For nonprofits, new proposal requirements can be a catalyst for transformation towards greater equity and inclusiveness in outcomes. Laura Stukel is a change management expert, with deep skills in stakeholder engagement, especially in work that brings multiple partners together to create bigger impact. Using examples from the past, present and towards the future, this session will help you to create a blueprint towards transforming how your organization considers outreach and partnerships, and to apply it towards developing stronger proposals.

Learning Objectives — Attendees will:

- Understand why the current moment is both transformational and historical (driven by federal grant-funding strategies, and trickling across philanthropy sector)
- Become aware of federal guidance on meaningful engagement that can be applied to work with other types of funders
- Identify two steps to shift-power or decision-making in their own community

The “Other Side”: Lessons from the For-Profit World

Room B

Lewis R. Jones, *Consultant*

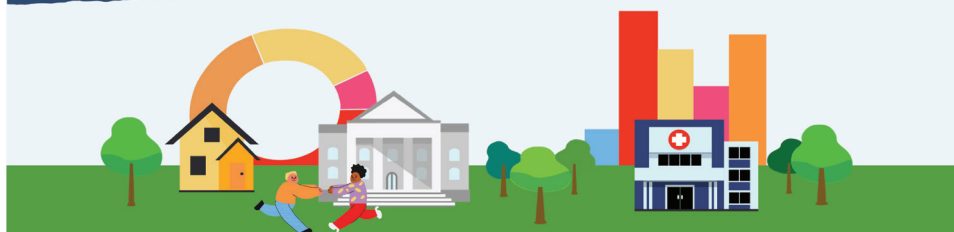
An engaging look at a few common corporate eye openers and what you can learn to improve your nonprofit including those dreaded P&L statements, raising revenue vs cutting expenses, “rules” of sales, and the people who make it all happen

- Numbers Tell a Story: Reading a P&L Statement
- Easier to Raise Revenue Than Cut Expenses
- Zero Is Mostly Good: Sometimes a Profit Isn’t Bad
- MBWA: Management By Wandering Around
- #1 Rule of Sales as Applied to Nonprofits
- It’s All About Relationships
- Put People FIRST

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Chicago Area Chapter GPA would like to express our deepest gratitude to all the volunteers who have helped to make today's conference possible.

Chicago GPA is always looking for volunteers, from micro-opportunities like greeting at the conference to full board service. Connect with a Board Member today or drop a note of interest to ChicagoGPA@gmail.com!

ABOUT US

GPA Chicago Area is one of the oldest and largest chapters in the Grant Professionals Association, the nation's leading organization focused on the profession of grantsmanship. The mission of GPA is empowering grant professionals and those they serve through: Advocacy—Advocating for members and the grants profession; Community—Creating powerful communities and connections; Professionalism—Fostering excellence in professional practice.

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LAND ACKNOWLEDGEMENT

We, the Chicago Area Chapter GPA, acknowledge that the land upon which we live, work, and meet and whose outdoor beauty we enjoy, the lifegiving waterways that run through it and whose lakes reside upon it are located on the traditional unceded homelands of the Council of the Three Fires: the Ojibwe, Odawa, and Potawatomi Nations. Long a center of trade, travel, gathering and healing, this land we call Chicago, its surrounding areas and the state of Illinois, has been and is the center of life for many additional tribes-including the Miami, Ho-Chunk, Menominee, Sauk and Meskwaki peoples. Today, it is still home to more than 100,000 tribal members in the state of Illinois, more than 20,000 residing in Chicago, one of the largest Urban American Indian communities in the United States. We acknowledge also the many Indigenous People who presently reside, thrive and contribute daily to our region. [\[Why Land Acknowledgements?\]](#)

About Our Statement

We recognize that the goal of any true land acknowledgement is to move beyond words to a call to action. It is a process of deep self-reflection, research, awareness and understanding and authentic relationship building. We commit to continually engage in such a process, particularly in strengthening our relationship with Indigenous People and colleagues working in the fields of philanthropy and grantsmanship. It is our hope that this land acknowledgement will inspire others to engage in this process as well.

OUR NATIONAL PARTNERS



Grant Professionals Association (GPA) is an international membership association for everyone in the grants industry. GPA helps grant professionals seek to continually improve their professional knowledge and skills in grant

research, proposal development, and post-award grant management. They set the standard with their commitment to ethical practices, high-quality educational offerings, excellence in resources, and the community of professionals committed to serving the public good. www.grantprofessionals.org

Read the GPA Code of Ethics here: grantprofessionals.org/page/ethics

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Grant Professionals Credentialing Institute (GPCI)

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Read the GPC Competencies here: grantcredential.org/the-exam/competencies-tested/



Grant Professionals Foundation (GPF) touches the lives of people in our communities by ensuring that resources are available to train, credential and advocate for those

grant professionals serving not-for-profit organizations who secure the funding necessary to serve the needs of our most vulnerable neighbors. They support the education that provides knowledge to grant professionals, the advocacy that gives them greater access to funding, and the credentialing that establishes and promotes excellence in the field.

www.grantprofessionalsfoundation.org

Donate to support colleagues through scholarship funding at grantprofessionalsfoundation.org/donate

Apply for scholarships: grantprofessionalsfoundation.org/scholarships

- GPA Membership (2/1-8/31)
- GPCI Exam/CMP Renewal (4/1-4/30)
- Grant Summit Conference (6/1-6/30)



SAVE THE DATES

***Monthly Members' Lunch & Learn**

11:45AM (gathering) | Noon-1PM

[*Members Only] Free, Virtual

Is there a topic you'd
like us to discuss?
Drop us a line at
ChicagoGPA@gmail.com

- Thursday, June 6 - Lunch and Learn (Virtual)
- Thursday, July 11 - Lunch and Learn
Book Club Discussion (Virtual)
- Thursday, October 10 - Lunch and Learn (Virtual)

September 26, 2024 | 12 pm

CHICAGO AREA CHAPTER

GPA QUARTERLY MEETING - Virtual

Topic: CFR200 Regulation Updates for Federal Grants

October 30 - November 2, 2024

GRANT SUMMIT

Denver, CO - In-person and Virtual

Register June 1 - August 15 for early discount!

December 5, 2024 | 12 pm

CHICAGO AREA CHAPTER

GPA ANNUAL MEETING - Virtual

Watch your inbox for new events in 2024

New Members Meet & Greet and Summer Social, August 2024

GPC study group, fall 2024

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GEMS was developed by a grant writer for grant writers, Founder & CEO Rachel Waterman saw her team heading for burnout and realized the firm needed to work more efficiently and create stress-free file management while building institutional memory. GEMS is the answer!

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