Building a Powerful Grant Strategy for 2016-2017

Speakers Today:

Tammy Tilzey
GrantHub Team,
Foundant Technologies

Cynthia M. Adams
CEO
GrantStation.com

The presentation will begin at 9am PST, 10 am MST, 11am CST, Noon EST

Before we begin…

Grab Tab

Minimize or Maximize the Control Panel.

Questions & Answers

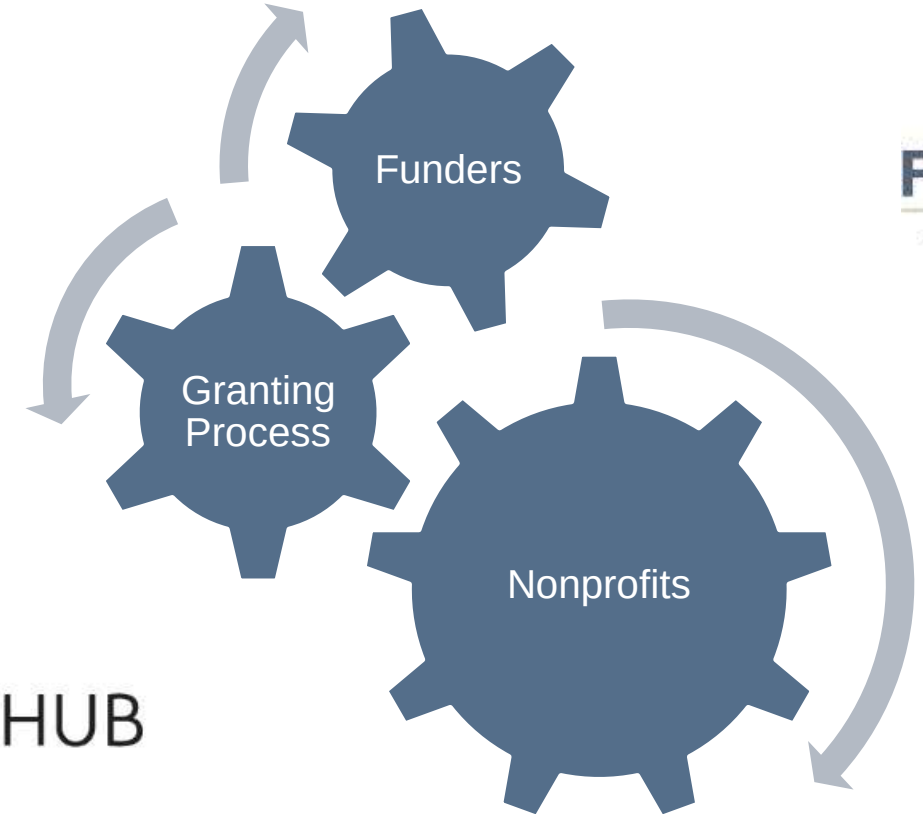
Submit questions or answers during the webinar.

Agenda

- Brief Foundant Overview
- Building a Powerful Grant Strategy
- Grant management software can support your grant strategy
- Q&A at end

Our Mission:

Improve the granting process for everyone involved



FOUNDANT technologies

GRANTHUB

Grantmaker Client Map

925 Grant Lifecycle Manager clients in 49 states and 5 provinces

Grantseeker Client Map

132 GrantHub clients

Foundant Company Profile

- 43 total team members

Outside's 2014 BEST PLACES to WORK

Outside's 2015 BEST PLACES to WORK

Building a Powerful Grants Strategy for 2016-17

Presented by:
Cynthia M. Adams, CEO, GrantStation.com

Learning Objectives

To clarify which project(s) need grant support in 2016-17.

To create and maintain a grants calendar for 2016-17.

To establish a consistent process for grants research.

To determine how to generate a grants strategy for a particular project

Today's Agenda

- Design and adopt a Grant Decision Matrix
- Develop project description(s)
- Identify the right grantmaker(s)
- Create a grants strategy
- Establish your 2016-17 Master Calendar

Please ask questions as we go along!

Establish your own process

It’s not the tools, it’s how you use them.

“There seems to be some perverse human characteristic that likes to make easy things difficult.” – Warren Buffett

Grant Decision Matrix

Should we apply for that grant?

- Apply the Matrix to RFP's and application guidelines
- Build the matrix in any spreadsheet program
- Establish basic **criteria** and **weights**
- Agree on a 'green light' / 'red light' **score**

Refer to Grant Decision Matrix (pages 1 – 3)

Grant Decision Matrix
Basic components

- **Criteria** – develop a set of decision criteria
  - Timing
  - Credibility
  - Relationship
  - Pre-proposal work required
- **Weights** – assign a weight to each criteria
  - Negative
  - Neutral (“0” weight)
  - Positive
- **Scores** – rate each opportunity

Know when the balance shifts one way or the other.

Grant Decision Matrix
A sample

Criteria	Weight
Subjective	
Relationship with grantmaker	4
Complements grantmaker's goals	3
Builds on organization's mission	5
Likelihood of award	3
Competition for award	0
Objective	
Eligibility	5
Serves community	4
Serves targeted population	4
Sufficient funds to meet need	3
Matching funds required	0
Administrative costs allowed	3
Adequate time to respond	3
Required outcomes achievable	1
Audited financials required	5
Project plan prepared	5
Partners required	0
Total Score	**49**

Key

0 = neutral

1 - 5 = positive

-1 - 5 = negative

Apply =
score of 35 or higher

Do not apply =
score of 34 or lower

Don't bite off more than you can chew!

Want to see a sample?

Good starting point! Non-scored Criteria

MANDATORY CRITERIA	**Prospective opportunity must meet ALL of these minimum criteria in order to be considered for pursuit. No points assigned to this section.**		
Eligibility Criteria met for:			
Organization type	501 c3 nonprofit, etc.	**Yes**	**No**
Geography	national, regional, local, etc.	**Yes**	**No**
Agency size/scope/budget	sometimes foundations limit the agency budget size.	**Yes**	**No**
Project serves target community	usually underserved or low-income	**Yes**	**No**
Project serves target population	minority, low-income, children, families, teens, etc.	**Yes**	**No**
	Mandatory Criteria Met? If yes, proceed to next section.	**Yes**	**No**

Second Step Scored Criteria

Do not pursue = <15 points	Requires Leadership Approval = 16-19 points	Pursue = >20 points	

SCORED CRITERIA	Negative			Neutral	Positive		
	-3	-2	-1	0	1	2	3
1 Relationship with Grantmaker	Funded in past, but not managed well	Gives only to preselected organizations		None	Yes - introductory only or invited to apply	Yes - has funded at least 1 proposal	Yes - has funded multiple and/or multi-year grants
2 Fits with Starfish's mission and Inkster Early Childhood Plan vision	Not within Current Inkster EC Plan and/or Target Budget Items	Emergency Need	Not within early childhood plan but important to building relationships/ community (e.g. Ford Volunteers)	Not w/in Early Childhood Plan but will be budget-relieving and/or opportunistic to expand	Budgeted funding need within Early Childhood Plan only	Budgeted funding need within Early Childhood Plan and current FY Budget targets	Unrestricted OR eligible to meet a matching grant (e.g. SIF/Baby Power)
3 Likelihood of award	Highly Unlikely	Not very likely	Not likely	Unknown	Somewhat Likely	Likely	Very Likely
4 Competition for award	Very competitive - national competition	Competitive - statewide w/out previous funding	Competitive- statewide (with previous funding)	Unknown	Regional	Metro Detroit only	Inkster included in RFP guidelines
5 Adequate time to write proposal	<1 week	<2 weeks	<3 weeks	4 weeks	5 weeks	6 weeks	7+ weeks

Create your own template!

Weighted factor decision matrix – no cost via Excel

- This spreadsheet helps you ***make complex decisions*** in which there are multiple options and multiple factors to consider.
- You ***weight*** the importance of the factors and ***score*** your options vs. those factors.
- It computes a weighted sum and shows you which option, given all the factors, wins.

"My supervisor (our Chief Development Officer) is super-excited about having this tool. Our goal is to present this to our CEO/Leadership Team in the next few weeks for final approval – this would mean that any prospective proposal would go through this (matrix) before being pursued."

Avery Eenigenburg
Corporate/ Foundation Specialist
StarFish Family Services
Inkster, MI

Grant Decision Matrix
Should we apply for that grant?

No, not now

Needs further consideration

Yes, move forward

Leadership approval for this process is key!

Where are we?

~~Design and adopt a Grant Decision Matrix~~

Develop a project description

Identify the right grantmaker(s)

Create a grants strategy

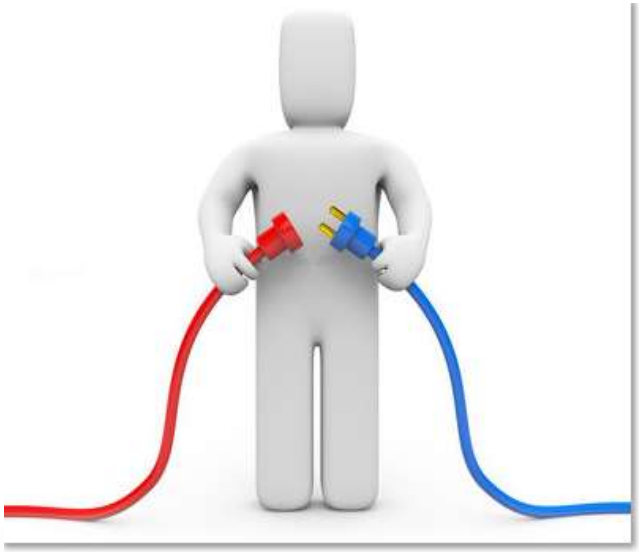
Establish your 2016-17 Master Calendar

Please ask questions!

Generate a worksheet & share it!

Prepare the worksheet

Add details



Connect your team to the worksheet

Project Description Worksheet
Components

- Project name (working title)
- Lead contact person (or team) overseeing the project
- Proposed project (short, narrative format)
- Need(s) to be addressed/ problem(s) to be solved (narrative format)
- Relationship to larger project(s) or past project(s)
- Project budget (summary)
- Key words for research:
  - Geographic focus
  - Areas of interest
  - Target population
  - Types of support

Refer to Grant Research Worksheets (pages 4 – 5)

Project Description Worksheet

Sample: Basic description

Project: Food Bank: Capacity Building

Lead: Mary Jane Hoffman, Executive Director & Jamie Smith, FR Committee Chair

Project description

Every day the volunteers pack and deliver between 30-50 food boxes. Each "box" contains at least 20 pounds of food per person and is enough food for three days. Last year the Food Bank served over 27,000 clients and distributed 1,392,000 pounds of food with the help of 16,700 volunteer hours. Collection of this donated food was streamlined in 2014 when the State Department of Transportation donated two used delivery vans. The regular delivery of food and household items is crucial to a well functioning food bank, but as important is making those items easily available to those in need.

The **facility upgrade** project will allow the Food Bank to add **delivery ramps, storage space (walk-in cooler and freezers), shelving, and a computer system** to track donated items. This space, will in turn, allow staff to streamline the delivery and sorting of critical food items in case of emergencies (natural or man-made disasters). New processes and procedures will be adopted to facilitate the growth of the Food Bank, as well as **staff training** to learn new systems.

To compliment the new facility, provide a new level of community engagement, and address our mission of providing individuals with the necessary skills and tools to alleviate hunger, the Food Bank will be adding a **community garden.** The garden will provide a leverage point to help teach good **nutrition** and educate the low-income residents on growing their own food. The garden will provide a **playground** for families with children.

Project Description Worksheet

Sample: Basic description

The Day-to-day Need

The problem isn't finding the groceries to package and give away, nor a method for picking up the donated items, but rather the facility used by the Food Bank volunteers for sorting, storing, and distribution of the food. Currently, the space being used has no delivery platform, inadequate storage space, and the area for sorting items is 12 X 16 with limited counter space. In addition, the process and procedures used are cumbersome and add a level of inefficiency that makes retaining volunteers difficult.

Not only the work space and the processes need to be addressed but also the lack of **leadership** in the volunteer program. A **full time Volunteer Coordinator** that could work with volunteers on a consistent basis would ……

Breaking the cycle of poverty

As critical as the day to day delivery of groceries and household items, is the need to teach those we serve how to prepare, plant, and grow a **garden** so they can become at least in part, a piece of the solution. There is over an acre of tillable land available on the side of the Food Bank where a community garden can be developed. Right next to the garden we will build a **playground** so families with children can . . .

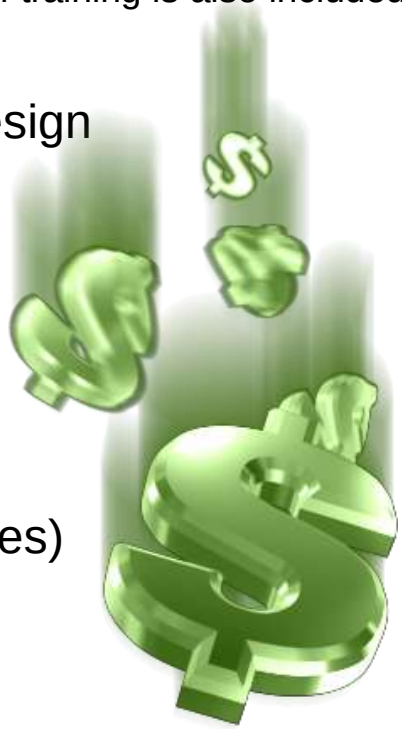
Relationship to past project

The donation of the two used delivery vans in 2011 provided a glimpse of how the Food Bank could streamline systems. The vans allowed the Food Bank to expand the collection of food, adding 14 regular donors to the program in the first three months of their use. The new procedures for picking up donated items, especially those that need immediate . . .

Project Description Worksheet

Budget summary

The total estimated budget for this project is $378,100.00 includes building plans, the addition, walk-in freezers and cooler, and loading ramps. A new software program and several new computers, as well as internet upgrade costs are noted. Gardening equipment and supplies round out the capital costs. A full time Volunteer coordinator and staff training is also included.



Addition, playground & garden design	$ 3,000.00
Building permit	$ 300.00
Loading ramps	$ 60,000.00
Sorting & storage rooms	$180,000.00
Walk-in freezers/cooler	$ 77,000.00
Software / hardware / training	$ 7,200.00
Gardening equipment/ tools (Lowes)	$ 1,800.00
Playground equipment (Miracle)	$ 14,800.00
Volunteer Coordinator (FT)	$ 35,000.00
Total Estimated Budget	**$378,100.00**

Project Description Worksheet

Identify key words

1. Geographic focus

4. Type of support

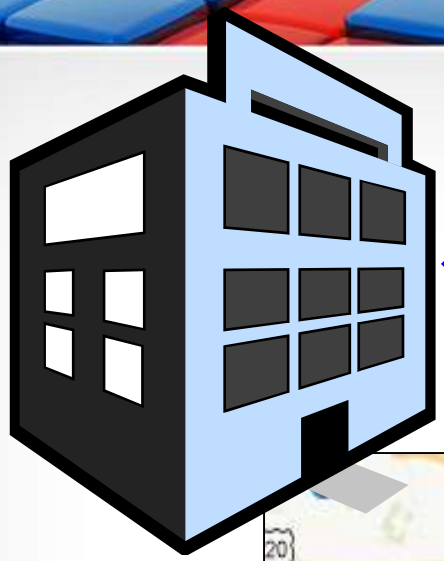
2. Areas of interest

3. Target population

Explore the options!
Delve deeper into each specific area and uncover new search criteria.

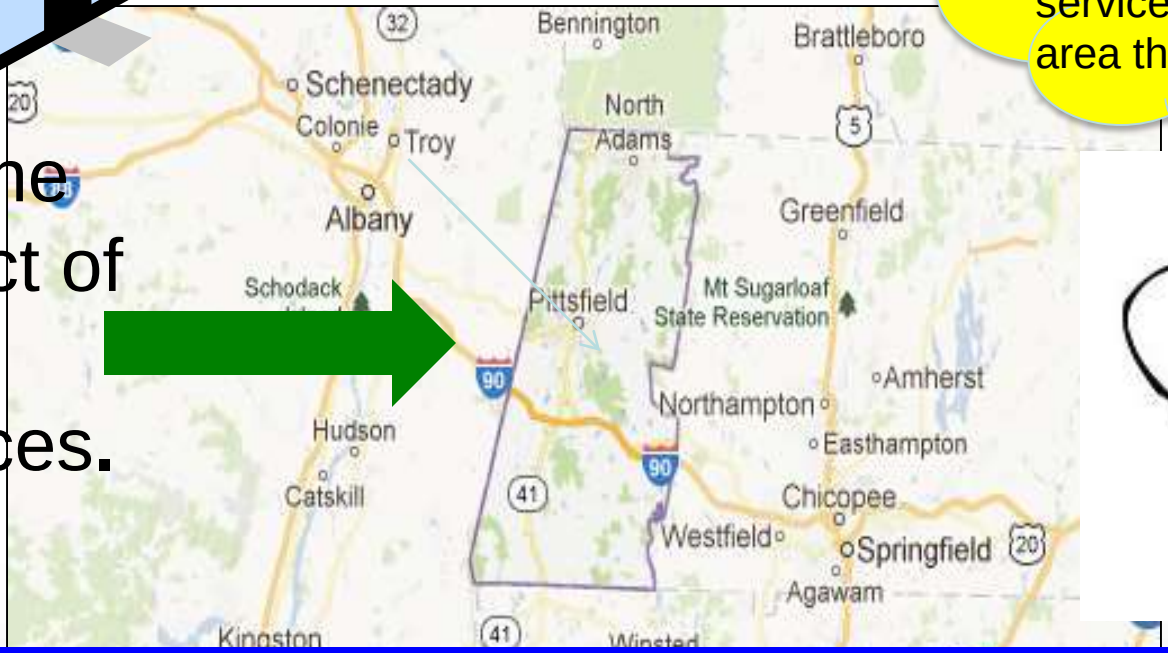
Answer these four questions . . .

Project Description Worksheet
Geographic focus



Distinguish between where you are located . . .

and the impact of your services.

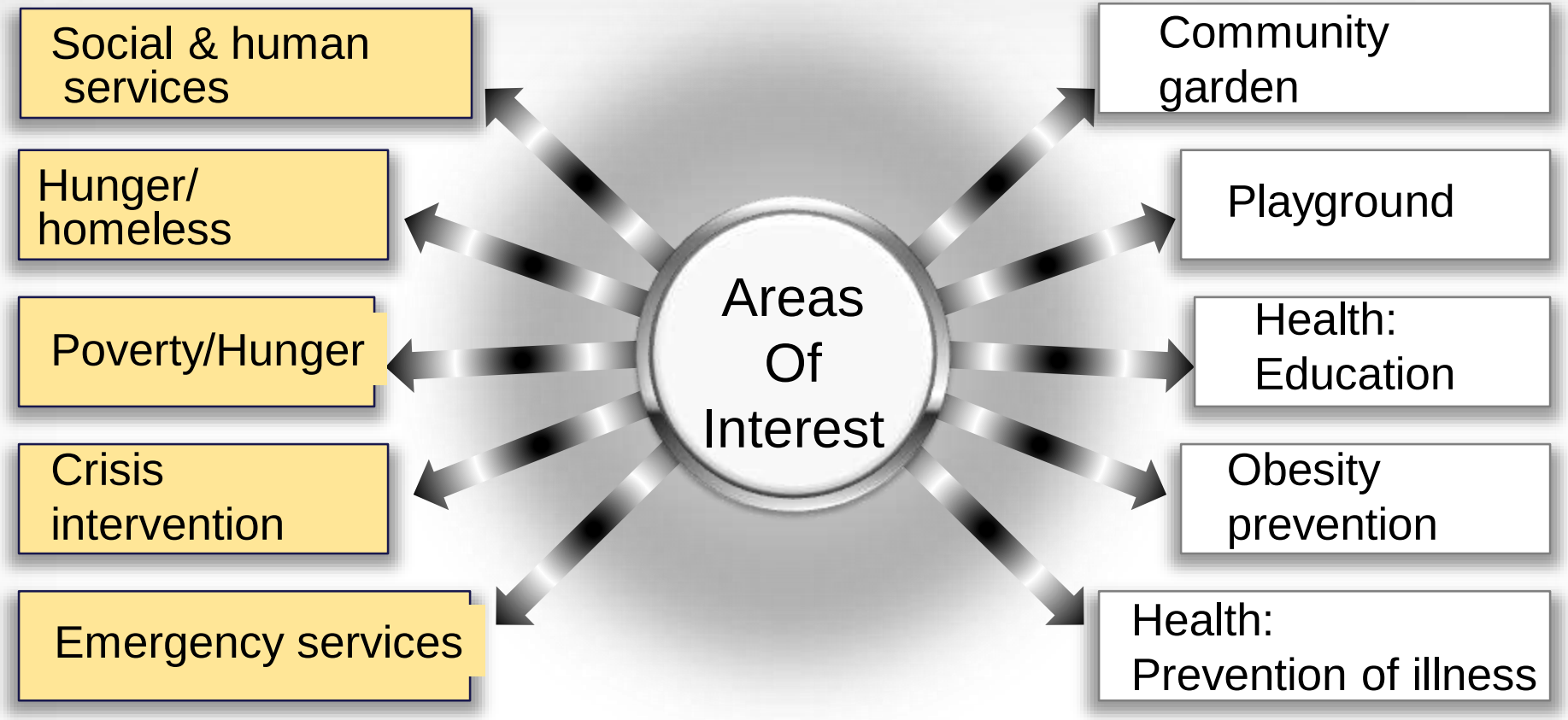


This broadens my geographic scope! Our services impact a broader area then just the County.

1.What is the geographic focus of this project?

Project Description Worksheet

Areas of Interest



2. Which areas of interest are we addressing with this project?

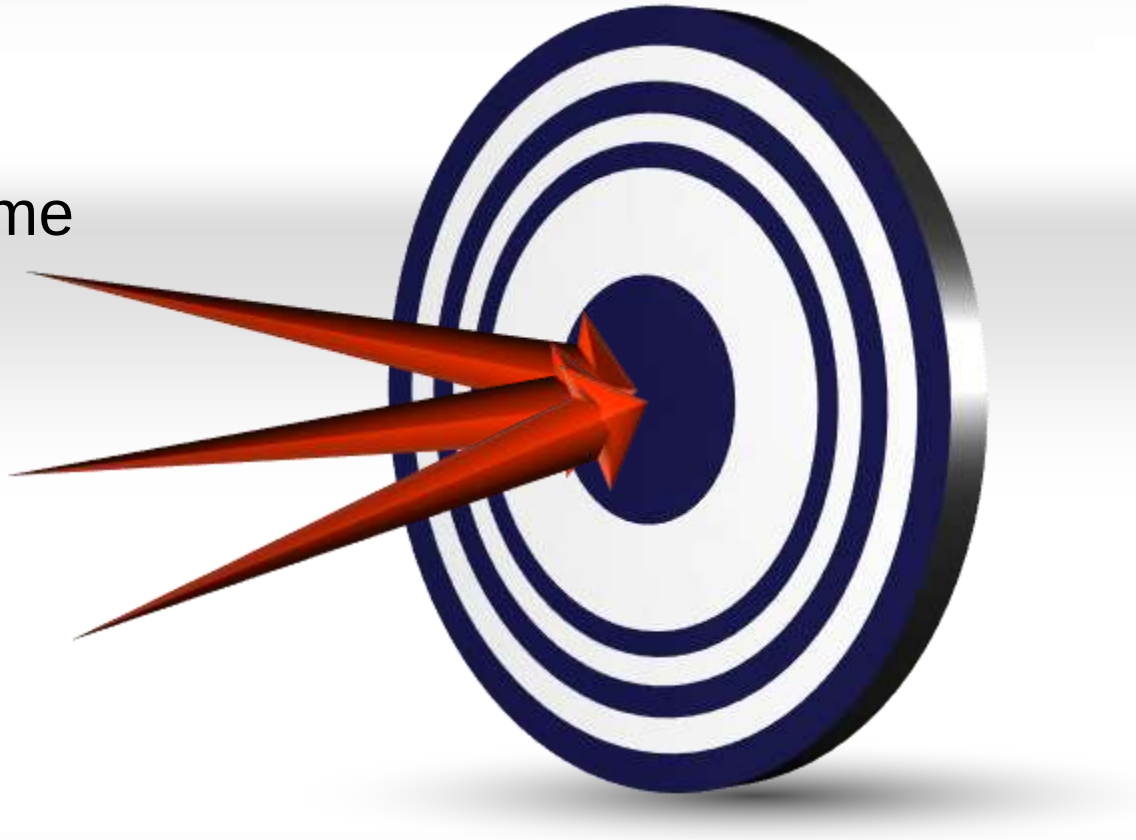
Project Description Worksheet
Target population

3. Is there a target population?

Poverty/ low income population

Families, women and children

Seniors / elderly

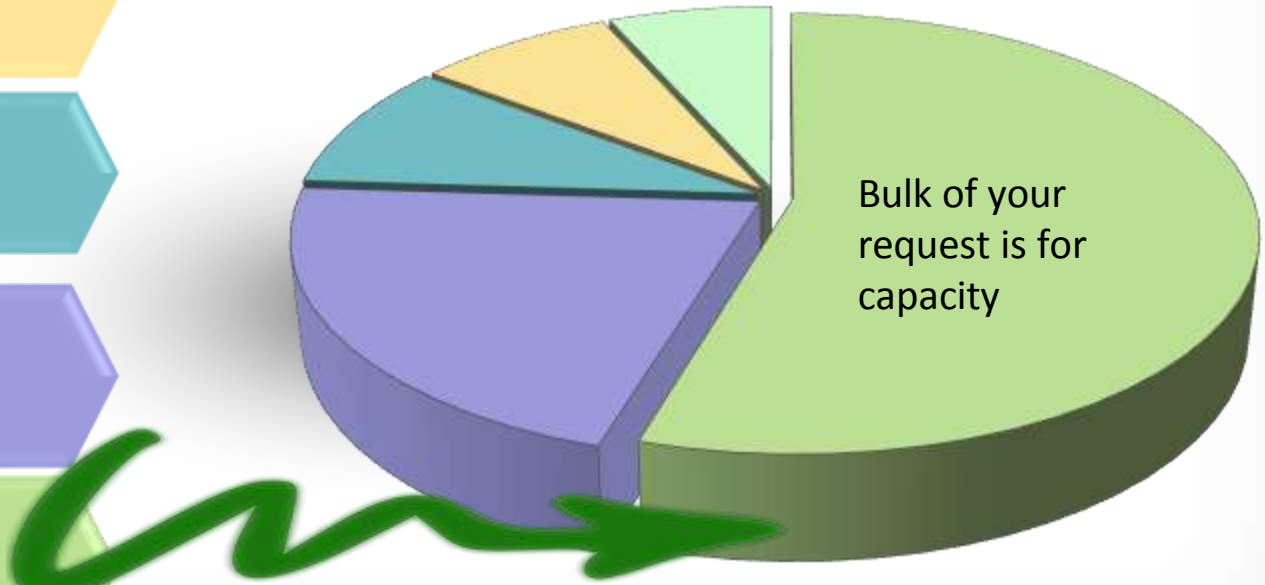


Project Description Worksheet
Type of support

4. What type of support do we need for this project?

- Project Support
- Project Planning
- Software/hardware
- Building & equipment
- Capacity building

$378,100.00



Where are we?

~~Design and adopt a Grant Decision Matrix~~

~~Develop project description(s)~~

Identify the right grantmaker(s)

Please ask questions!

Create a grants strategy

Establish your 2015-16 Master Calendar

Apply a consistent research method

Six specific, easy to do steps

1st
Look for government & private sources

2nd
Review background materials

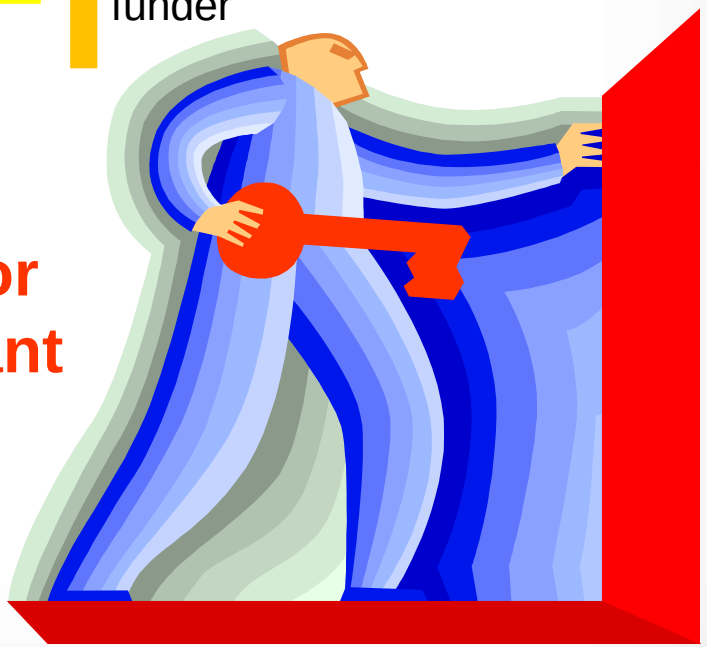
3rd
Determine questions

4th
Create a script

5th
Contact funder

6th
Build strategy

Unlock the door to the right grant makers



Refer to worksheets (pages 6 – 9)

Grants Research
Step One

- Cash
- Products & Services
- Technical Assistance

Check out government funding

Federal

State

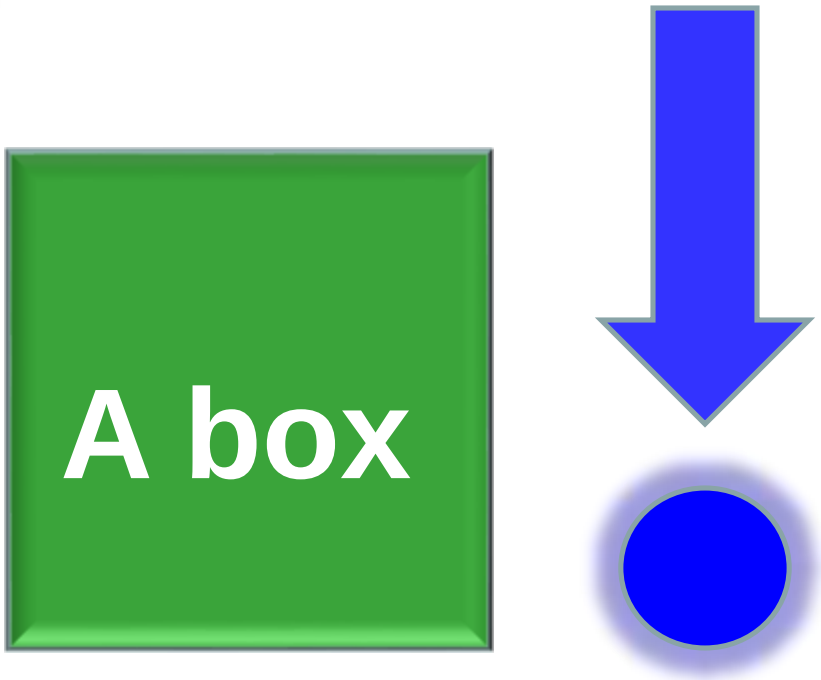
Local

Research private grantmakers

- Foundations (regional, national, global)
  Family Trusts, Community Foundations
- Corporations (local business, regional, national, global)
- Religious grantmakers (cross denominations)
- Associations and clubs (local, statewide, national & international)
- Giving Circles

Grants Research
Step One

Start here



Is there technical assistance available?

Are there product donations I can use?

Innovative ideas occur when we leave our comfort zone, or when we break the rules.

Grants Research
Step One

Who provides insurance for businesses and people in our community?

Example

American Family Insurance

Company supports organizations that provide housing, food, and shelter

Farmers Insurance

Gives to health and human services

Nationwide Insurance

The Foundation partners with organizations that help at-risk youth and families in poverty situations who need tools and resources to advance their lives.

Always consider religious grantmakers

Example

Presbyterian Hunger Program

Supports programs that provide food relief to poor people. Projects that help feed or house an especially underserved constituency.

Be sure and check all of your existing vendors

Who do we bank with?
Who provides our utilities?
Who provides our insurance?
Do we pay rent or mortgage, and to whom?

Grants Research
Step One

Giving circles represent an emerging trend in which groups of individual donors collaborate to support individuals, charitable organizations or projects of mutual interest.

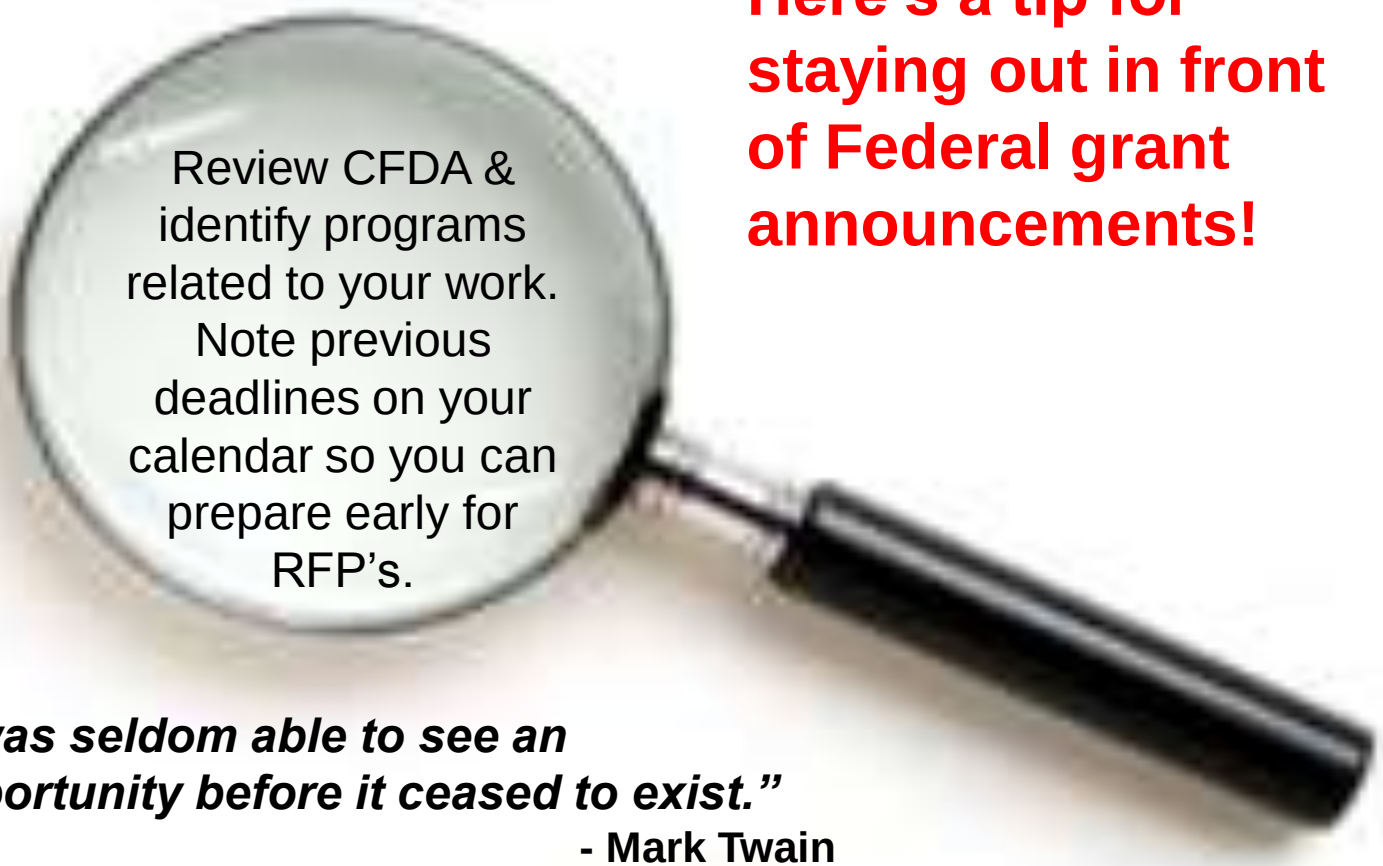
The Giving Circles Network
This website is helpful if you want to learn about forming grassroots philanthropic initiatives in your community.

The Giving Circles Knowledge Center
If you're interested in learning more about giving circles or starting one yourself.

At **Impact100 Philadelphia**, more than 200 women, ages 30 to 80 (although most are in their 40s and 50s), donate $1,000 each and pool their contributions to make at least one grant of $100,000 annually to nonprofits they collectively choose from each year's contributions.

Is there a Giving Circle in your community?

Grants Research
Step One



Here's a tip for staying out in front of Federal grant announcements!

"I was seldom able to see an opportunity before it ceased to exist."

- Mark Twain

Grants Research
Step One

Here's a tip for sorting through potential grantmakers

"Without leaps of imagination or dreaming, we lose the excitement of possibilities. Dreaming, after all is a form of planning."

Gloria Steinem

Grants Research:
Steps Two & Three

Review and eliminate

First Cut

Deadline date(s)
Average grant award
Geographic focus
Areas of interest
Types of support

Second Cut

Who have they given to in the past year?

Have they funded a project similar to ours?

Apply the Grants Decision Matrix

Develop questions

- *Can they share with you the review process?*
- *Should the proposal be written for reviewers with technical or non-technical backgrounds?*
- *As a first time applicant, should you ask for a less amount then average?*
- *Can they tell you the probable award announcement date?*
- *What are the most common mistakes in the proposals they receive?*
- *Are there unannounced programs or unsolicited funds available to support your project?*

Grants Research:
Steps Four & Five

Create a script

Let the funder know, right up front, that you have **done your homework** and have just a few specific questions to ask before you develop an application.

- **Don't** ask questions that are already answered in their published materials.
- **Do** introduce yourself, your role, and one or two sentences about your organization.
- **Don't** give them a lot of information about your organization or project at this juncture.

Engage the grantmaker

Contact via email or phone

Don't go off script!

If you are writing an email, make it short and easy for them to answer specific questions.

Subject: Two quick questions

If you are calling, tell them exactly how much time you need (5 minutes, 10 minutes, etc.) and stick to it.

Where are we?

~~Design and adopt a Grant Decision Matrix~~

~~Develop project description(s)~~

~~Identify the right grantmaker(s)~~

Please ask questions!

Create a grants strategy

Establish your 2016-17 Master Calendar

Create a grants strategy

There is a difference . . .

Small Changes

&

Strategic Changes

”Strategy is about making choices, trade-offs; it's about deliberately choosing to be different.”

- Michael Porter

Create a grants strategy
Step Six

- ❑ Goal-oriented
- ❑ Fact-based
- ❑ Multiple alternatives

- Circles back to the Grant Decision Matrix
- Secure support on your strategic approach
- Keep the plan flexible and adaptable

- ❑ *Strategy is an elaborate plan of action. Effective strategy relies on in-depth research, and an understanding of the grant makers intentions.*
- ❑ *Strategies evolve and change over time. With the right strategic grants approach in place, your tasks gain more clarity allowing for sound decision-making.*

Refer to Grant Strategy Worksheet (page 10)

Create a grants strategy
Step Six

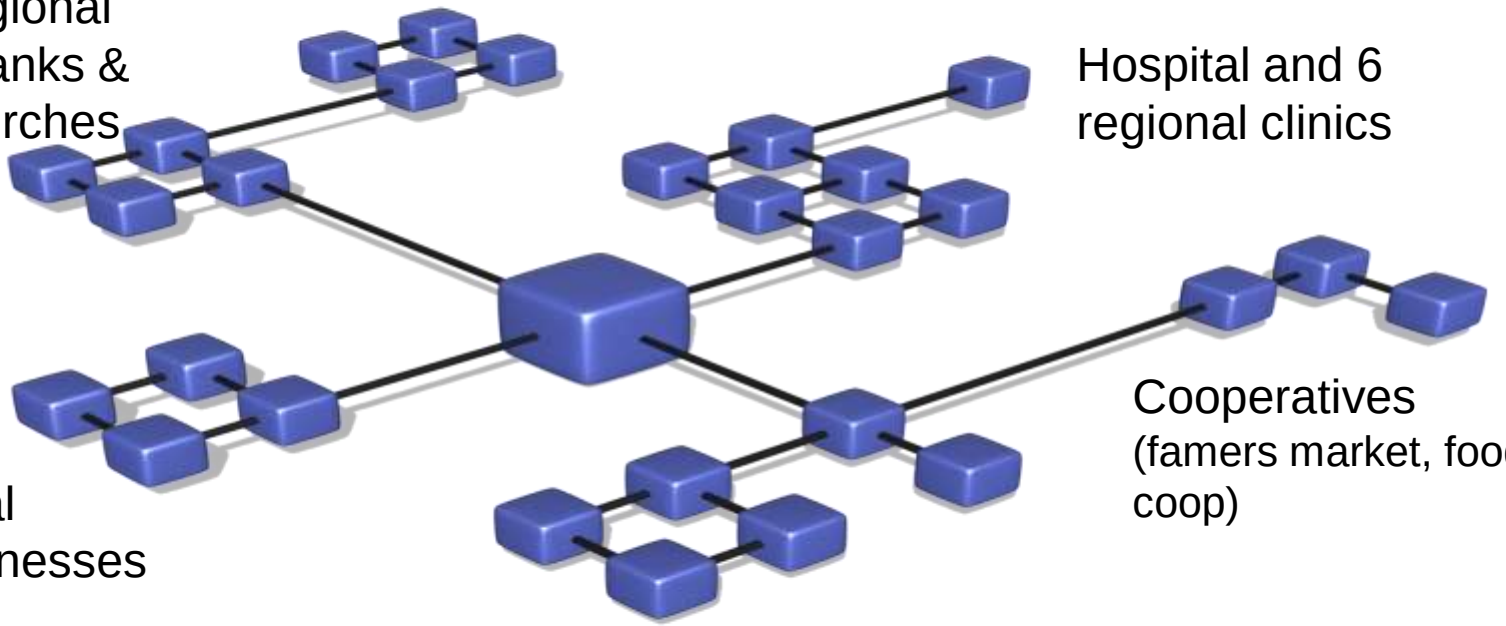
Collaboration is no longer an option for grantseekers – it is now a necessity.

"... you can form consortiums and apply for grants as it is more attractive to go after these funds as a group. I have formed consortia as small as two districts and as large as 21 school districts. It works!"

Jane Erickson
DEVO Consultants Detroit

Create a grants strategy
Step Six

Build several sets of collaborative partnerships



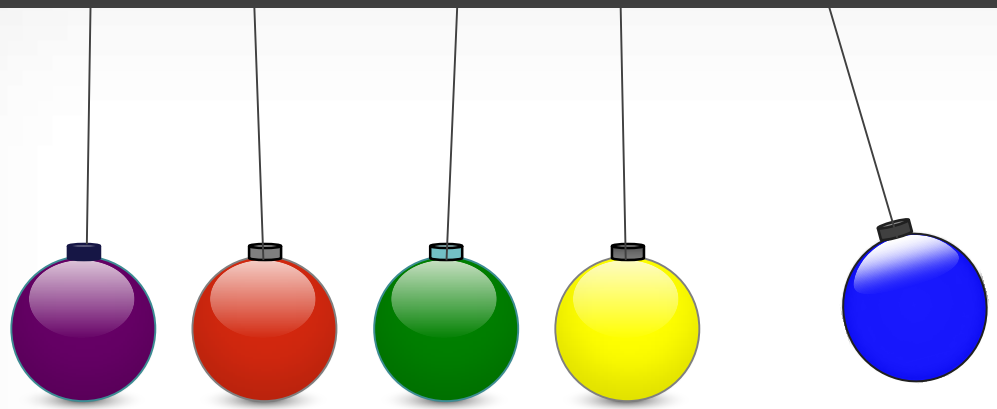
Agile, connected - small is often where the power lies to create real change."
– Hildy Gottleib, Creating the Future

A possible grant strategy
An example

Grantmaker	Request	Deadline
Open Deadlines		
• USDA Community Facility Planning Grant	$25,000.00	Quarterly
• Miracle Planning Grant	In-kind	Open
• First National Bank of MA	$ 4,500.00	Quarterly
• MA Power and Light	$ 4,500.00	Quarterly
Deadlines in 2016/2017		
• State Capital Grants Program	$ 30,000.00	Sept 3
• Presbyterian Hunger Program	$ 30,000.00	Sept 11
• USDA – Community Facilities Grant	$100,000.00	Oct 23
• Alfred Logan Family Foundation	$ 25,000.00	Oct 28
• Gardens of America	$ 20,000.00	Nov 15
• The Brighton Fund	$ 45,000.00	Jan 23
• The Founders Trust	$ 85,000.00	March 15

Tip! Posting your strategy to fund a project on your web speaks to transparency

Summary of the strategy



Think of strategy not as something set in stone, but rather a framework you can use to work out how to respond to a rapidly changing external environment.

- Build several collaborative partnerships: the Farmers Market, school district, etc. to expand the field of potential funders.
- Identify and secure planning funds (either via TA or cash grants) using the partner-ship(s) as leverage.
- Secure local support (even if it is minimal) using the planning documents as the request.
- Identify potential product donations and weave them into the overall plan where leverage points may be critical.
- Apply for larger cash awards using the support garnered to demonstrate credibility. Take the planning grant and develop it into a detailed grant request.

Where are we?

~~Design and adopt a Grant Decision Matrix~~

~~Develop project description(s)~~

~~Identify the right grantmaker(s)~~

~~Create a grants strategy~~

Please ask questions

Establish your 2016-17 Master Calendar

Preparation can't be ignored.
It is preparing that will lead you to success.

Grants Calendar

Refer to guidelines to identify all the necessary tasks to include in your calendar.

- ✓ Complete application form / signed by President
- ✓ Secure a match of $10K before submission (use volunteer hours and $2500 cash we have set aside)
- ✓ Write 5 page proposal
- ✓ Cover letter / signed by President
- ✓ Secure written Board approval: budget and preliminary design plans
- ✓ Get collaborative MOA developed and signed by partners

Grants Calendar

Project specific

Grantmaker	Start Date	Draft Date	Submission Date	Decision Date
Miracle Grants Program	2 – June	6 – June	8 – June	June - 2016
USDA Community Facility Planning	7 - June	11 – June	26 – June	July - 2016
MA Power & Light	7 - June	11 – June	26 – June	July - 2016
1st National Bank	1 – Aug	14 – Aug	3 – Sept	October - 2016
State Capital Grants Program	1 – Aug	19 – Aug	1 – Sept	October - 2016

Sample calendar entry under Start Date (2-June-2016)

Miracle Grants: Start: outline application, assign tasks w/ 4/06 deadline; request Board President cover letter

Refer to Grant Calendar Worksheets (page 11-12)

Master Grants Calendar
Combined projects

Combine Project Calendars = Master Grants Calendar

- Grantmaker / start date / draft due date / submission date/ decision date

Electronic calendar

- Note all important decision points

1 Sept 2016
USDA: Finalize budget; insert request amount into cover letter and proposal summary

Wall calendar

- Establish benchmarks to monitor progress

Bank $8,000 to $10,000 in local support by August 15, 2016

Master Grants Calendar
Sample

Grant Maker	Project	Request amt			Full proposal due date	Status
Fielder Foundation	**Expand after school program**	**$ 25,000.00**	**Task**	**Due date**	**1-Nov-16**	**Not started**
			Collect quantitative date	10-Sep		
			Collect qualitative data	10-Sep		
			Develop budget & narrative	15-Sep		
			Draft proposal for edits	1-Oct		
			Finalize proposal	5-Oct		
			Cover letter signed by President	15-Oct		
Carey Trust	**Playground Equipment Capital Request**	**$ 30,000.00**	**Task**	**Due date**	**1-Dec-16**	**Not started**
			Re-work Fielder request	5-Oct		
			Cover letter signed by President	15-Oct		

Building a Powerful Grants Strategy for 2015-16

Remember! Don’t bite off more than you can chew.

Building blocks of a powerful grantseeking program

Keep the pipeline full

Think creatively!

Adopt a research process

Focus your research

Develop, adopt, apply

Building a Powerful Grants Strategy for 2015-16

Thank you for joining us today!

Cynthia Adams, President/ CEO

GrantStation
Your Fast Track to Funding

Agenda

- Brief Foundant Overview
- Building a Powerful Grant Strategy
- Grant management software can support your grant strategy
- Q&A at end

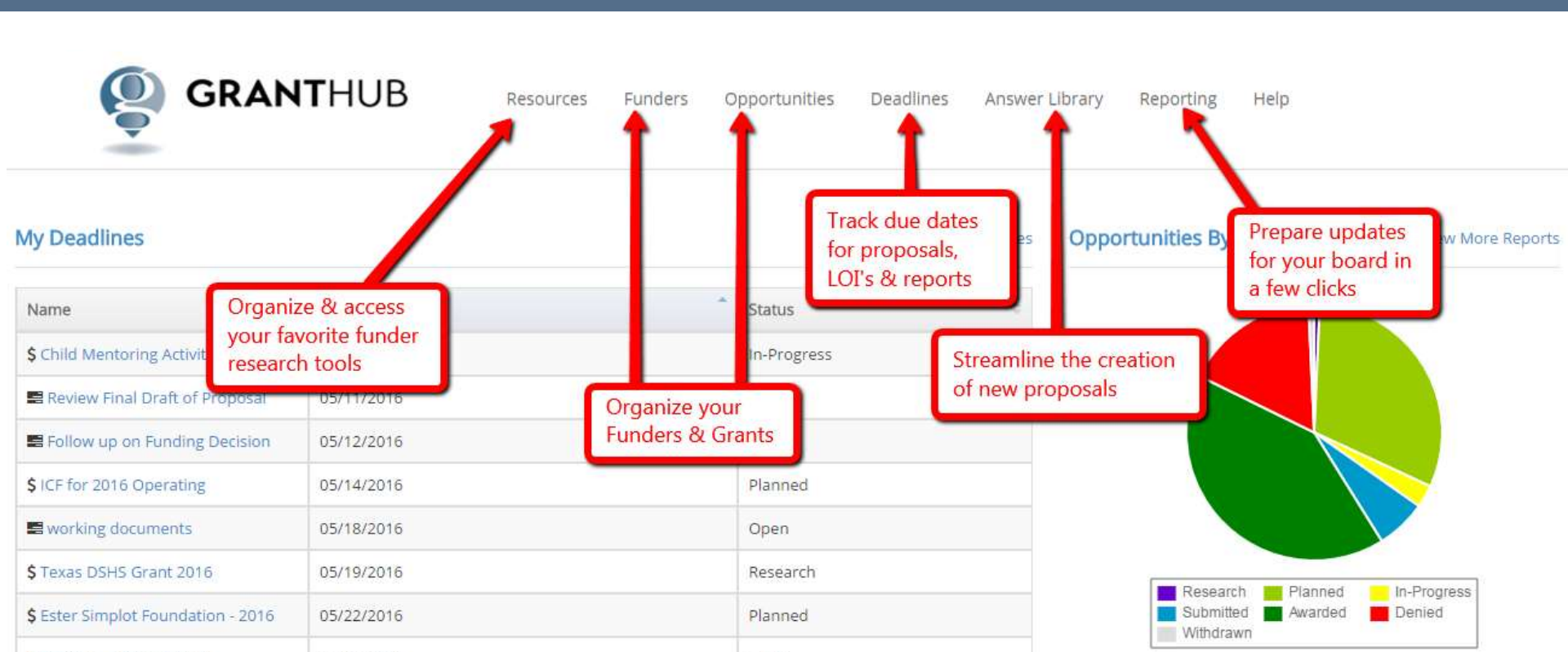
Grant Management Can Support Your Grant Strategy / Process

Save Time

Never Miss a Deadline

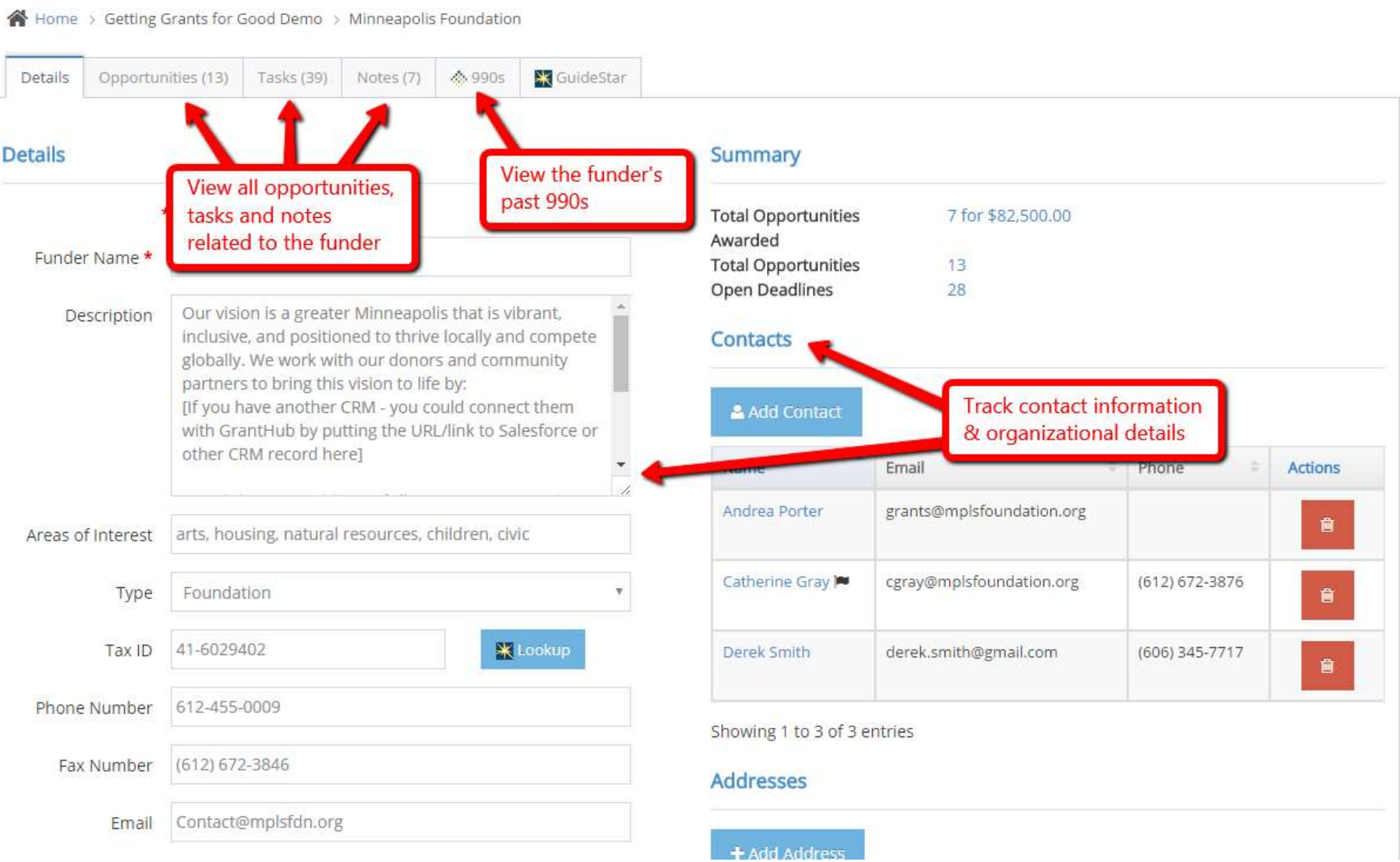
Peace of Mind

Retain Institutional Knowledge



- Organize Funders & Grants
- Track Your Proposals, Deadlines, Awards
- Streamline the Creation of New Proposals
- Protect Your Institutional Knowledge

Funder Management



Central Repository

Home > Getting Grants for Good Demo > Minneapolis Foundation > Economic Vitality Grant Program 2016

Details | Tasks (7) | Notes (109) | Documents (7)

Keep all documents related to the opportunity in one place

Documents

$ Economic Vitality Grant Program 2016

_Education Program Budget - Final.xlsx	13.5 KiB	
MN Economic Vitality Grant Application Final.docx	30.2 KiB	
Final Report Checklist.pdf	0.5 MiB	
Grant Application Form.docx	0.5 MiB	

Submit LOI

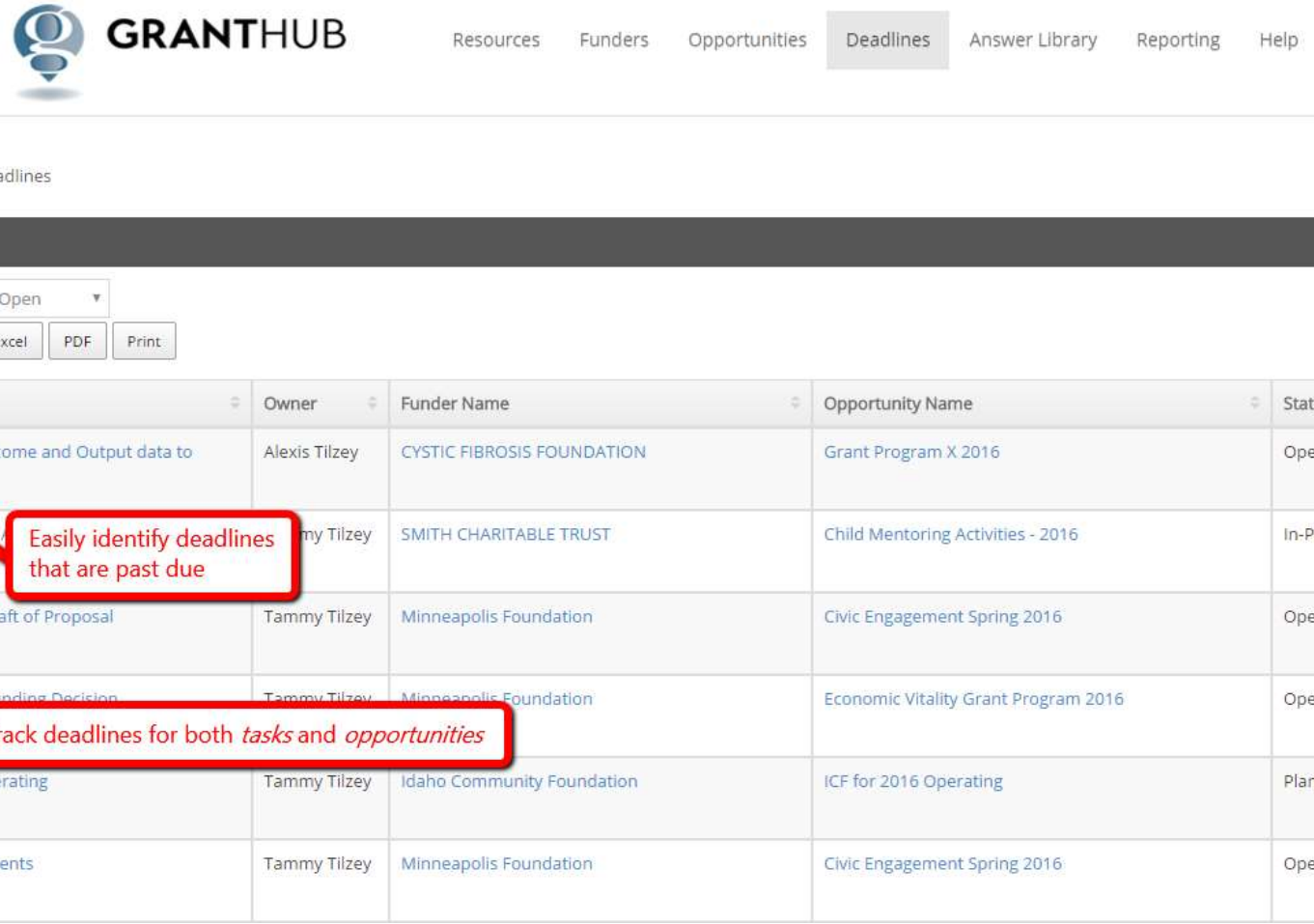
LOI Minn Grant 2015.docx	12.8 KiB	
LOI Template.docx	12.8 KiB	

* The document will be uploaded to the opportunity. If you would like to attach a document to a task, please open the task by clicking the blue arrow next to the task name.

Drop files to upload

(or click)

Management of Deadlines



Grant Team Management

Home > Getting Grants for Good Demo > User Details

User Details

* Indicates Required field

First Name * Allison

Last Name * Bender

Email Address * allisonbender@gmail.com

Phone Number * 2222222222

Role * Viewer

Status * Inactive

You have selected to change the role or status of this user.

Items must be re-assigned to a new owner.

- If the role is changed to Viewer all opportunities will be re-assigned.
- If the status is changed to Inactive all Opportunities, Tasks, Documents, and Answers will be re-assigned.

Re-assign to User * Select A User to Re-assign Ownership

Cancel Save

Staff turnover? Quickly reassign their tasks to someone else!

Central Management of Templates, Boilerplates, Supporting Documents

Use the answer library to store answers or documents to commonly asked questions.

Home
› Getting Grants for Good Demo

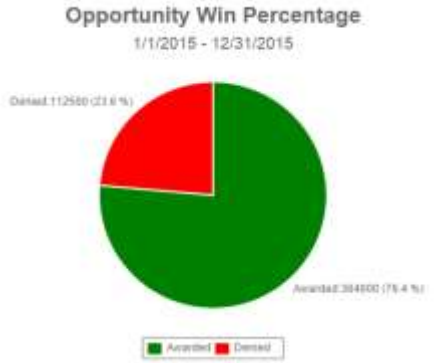
Answer Library

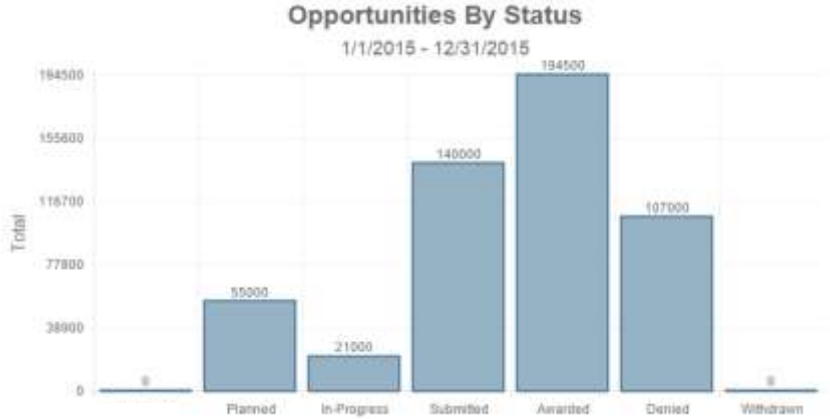
+ Add Answer | Export All | Edit Tags | Refresh GuideStar Answers

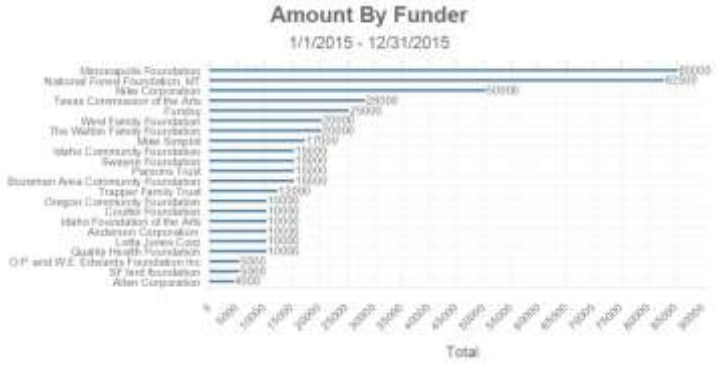
Search:

	Name	Tags	Owner	Expiration	Last Updated	Actions
☐	.Board of Directors	Board Member List,board list	Tammy Tilzey	5/20/2016	1/28/2016	
☐	.FY2016 Operating Budget	operating budget	Tammy Tilzey	3/6/2017	3/7/2016	
☐	.How will you know if you are making progress on your goals?		Tammy Tilzey	3/7/2017	4/18/2016	
☐	.Mission Statement	mission statements,puppies behind bars,500characters	Tammy Tilzey	3/6/2017	3/7/2016	
☐	.Organization History	Soup kitchen,History	Tammy Tilzey	5/22/2016	12/29/2015	

Quick Access to Information







Report Details

Copy CSV Excel PDF Print

Search:

Name	Funder Name	Funder Type	Amount Requested	Amount Awarded	Status	Deadline	Decision Date	Owner	Funding Type	Opportunity Category
2015 Annual Donation	Trapper Family Trust	Individual	$10,000.00	$12,000.00	Awarded	Nov 3, 2015	Nov 4, 2015	Tammy Tilley	Program Funds	Youth investment programs
AAPI first generation college student scholarship	Coulter Foundation	Foundation	$5,000.00	$0.00	Submitted	Nov 17, 2015		Tammy Tilley	Other	Youth investment programs
Active Kids Grant - 2015	Nike Corporation	Corporation	$50,000.00	$50,000.00	Awarded	Mar 2, 2015	Aug 3, 2015	Tammy Tilley	Program Funds	Youth investment programs
Allen International Medical June opportunity	Allen Corporation	Corporation	$4,000.00	$4,000.00	Awarded	Jul 31, 2015	Aug 1, 2015	Tammy Tilley	Program Funds	Client A

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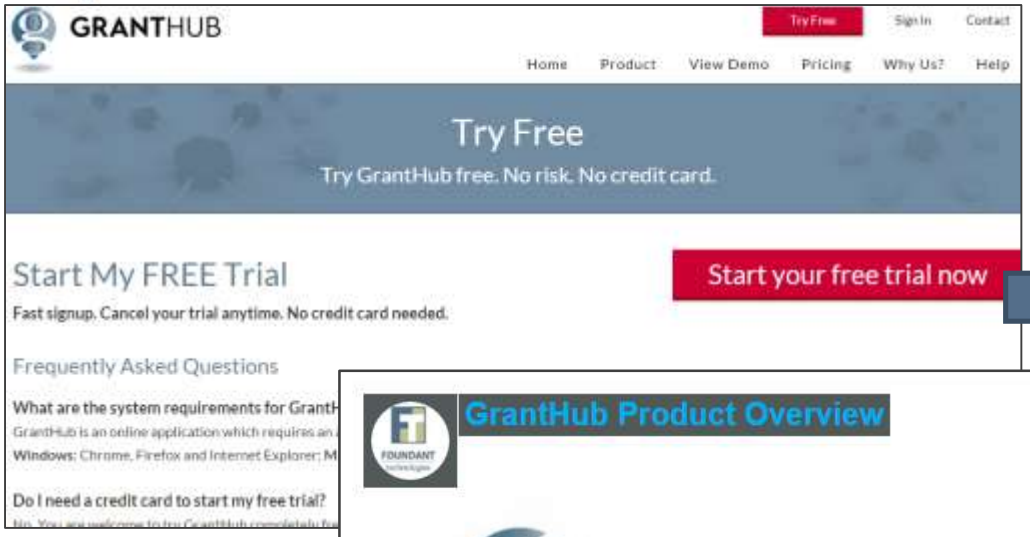

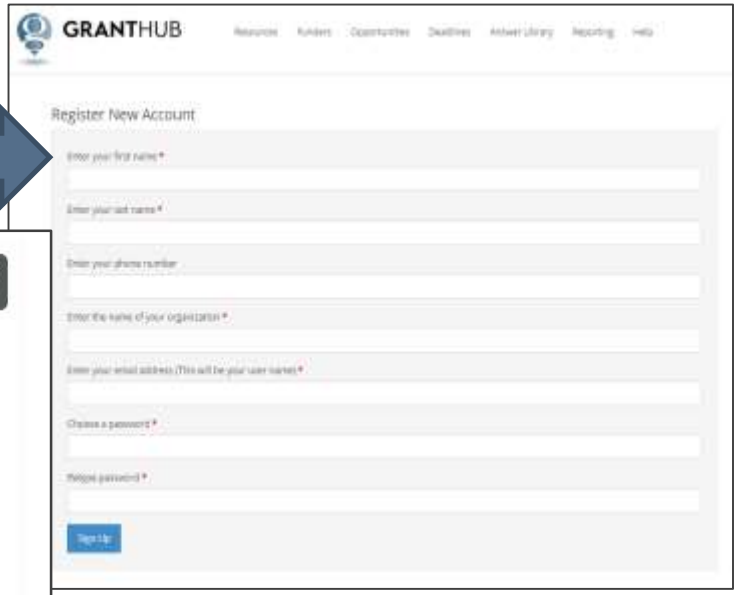

Questions?

Cynthia M. Adams

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