DEENA STRATEGIC GROUP

Grant Cycle & Program Record

Eastside Tenant Circle (fictional) - prepared 2026-11-09

Built only from answers your organization entered. Blank items are marked so you can finish them. This is a working document, not a guarantee of funding or eligibility.

The Underneath: cause, intervention, outcome

History: In the 1960s the city cleared two Eastside blocks for a highway and never rebuilt the housing; most families who stayed became renters. (Source: City planning commission records, 1962 to 1968 (fictional))

What sits underneath: Most homes here are owned by out-of-area landlords, and the court calendar gives renters days, not weeks, to respond.

What this program acts on: Our clinics act on the response window. They do not change who owns the housing; our repair organizing works on that.

Community and kinship assets (community knowledge): Families share rides to court, church members translate notices, and long-time tenants keep a phone tree of who to call. (How we know: Tenant leader meetings and six years of clinic practice; no private stories recorded)

This place, and community knowledge as evidence

What is different here: Three Eastside blocks where most families have rented from the same out-of-area owners for decades, and where many households speak Spanish or Haitian Creole at home

What is different about us: We are renter-led: four of seven board seats are held by current tenants, and our clinics meet in the church hall people already use

Barriers: Eviction notices arrive only in English with legal wording, the court gives days rather than weeks to respond, and the closest courthouse is two bus transfers away (Source: County court notice forms and calendar rules, read October 2026; bus route map (fictional))

Trust pathways: Renters first call a tenant leader or a church translator, not an agency. Word moves through the phone tree and Sunday announcements

Knowledge 1 (Cleared to share, naming the group; Observed by us; may appear in drafts): People do not open a court envelope until someone they trust tells them it is safe to read. Held by Tenant leaders; gathered Leader meetings over six years of clinics on 2026-03-10; holds for The three Eastside blocks we work in. Changes: Tenant leaders, not staff, make the first call after a filing.

Knowledge 2 (Cleared to share, without naming anyone; Told to us (self-report); may appear in drafts): Families arrive at court on time when a neighbor rides with them. Held by Clinic participants; gathered Two report-back nights, tallied by hand on 2026-10-14; holds for Hearings at the county courthouse. Changes: Add shared rides to the court-day plan.

Knowledge 3 (Not cleared to share; Told to us (self-report); kept out of drafts): One landlord delays repairs after any tenant attends a clinic. Held by Two tenants; gathered Private conversation at a clinic on 2026-09-02; holds for One building. Changes: nothing recorded.

Budget line your context points to, not yet priced: Interpretation and translation. From your barriers: "Eviction notices arrive only in English with legal wording, the court gives days rather than weeks t…"

Budget line your context points to, not yet priced: Transportation (fares or rides). From your barriers: "…respond, and the closest courthouse is two bus transfers away"

Budget line your context points to, not yet priced: Community measure validation sessions (stipends, food, space). You have community-defined measures. The people who define and check them should be paid for that time.

Check: Community knowledge 3 is not cleared to share. It shapes your thinking but never prints in a draft.

Community knowledge is evidence of how things work here. It is labeled by how it is known and never presented as proof that the program caused a result.

The Underneath: context, risk and options

Board and governance - Check - Legal requirement. Verify in your state. Directors must oversee the money with care under state nonprofit law. Your board's authority and trust in the community are strengths. The gap is reading and questioning the financial statements, and that can be added without changing who governs. Chosen: Pay for treasurer training for a current member. Keep: Keep resident, founder and kin authority. Add expertise around it; do not replace members to add credentials.

Board and governance - Note - Professional convention. Optional. Adding well-known or wealthy members is a fundraising convention, not a legal or fiduciary requirement. It is not a sign of a better board. Keep: Resident stewardship and community accountability are governance assets. Name them in your proposal.

Board and governance - Note - Funder preference, not law A "100% board giving" expectation is a funder preference, not law.

Money and compliance risk - Fix - Funder preference, not law Being paid after you spend leaves $5,500 you do not hold, about 0.4 months of your operating budget. You hold about 1.5 months of reserves. Payment terms are the funder's choice.

Measures and who chooses them - Note - Judgment call Measure the system change alongside your project outcomes, so the project is not held responsible for both.

Theory of change and logic model

If we hold weekly notice clinics and court-date accompaniment for renters with an eviction filing, then more households attend their hearing with a plan, because people who understand the notice and arrive prepared can ask for time, payment plans or repairs.

Resources: 2 part-time organizers, 6 trained tenant leaders, church hall space, legal aid referral line

Activities: Weekly clinics; text reminders the day before court; accompaniment to hearings

Outputs: Clinics held; households seen; hearings accompanied

Near-term outcomes: Households attend their hearing with a written plan

Mid-term outcomes: Households reach an agreement or dismissal instead of a default judgment

Long-term outcomes: Fewer forced moves in the three neighborhoods

Assumptions: Legal aid can take referrals within a week; the court keeps the current calendar

External influences: Rent increases, court scheduling changes, state rental assistance funding

What keeps it in place: Court rules give renters days to respond, and city code enforcement responds to complaints only.

This project changes: More renters arrive at court prepared, with a written plan.

Needs funder, city or system change: A longer response window on the court calendar, and proactive code inspections. Measured by: court rule and inspection policy changes adopted

Who chose the measures: Chosen with the community; checked with tenant leaders and clinic participants

What is different here: Three Eastside blocks where most families have rented from the same out-of-area owners for decades, and where many households speak Spanish or Haitian Creole at home.

What is different about us: We are renter-led: four of seven board seats are held by current tenants, and our clinics meet in the church hall people already use.

Barriers the design plans around: Eviction notices arrive only in English with legal wording, the court gives days rather than weeks to respond, and the closest courthouse is two bus transfers away. Source: County court notice forms and calendar rules, read October 2026; bus route map (fictional).

How the work travels (trust pathways): Renters first call a tenant leader or a church translator, not an agency. Word moves through the phone tree and Sunday announcements.

Design change from community knowledge 1: Tenant leaders, not staff, make the first call after a filing. Why: People do not open a court envelope until someone they trust tells them it is safe to read (Tenant leaders; observed by us).

Design change from community knowledge 2: Add shared rides to the court-day plan. Why: Families arrive at court on time when a neighbor rides with them (shared without attribution; told to us (self-report)).

SMART objectives

Households with an eviction filing attend their hearing with a written plan. Measure: Clinic follow-up log; baseline 35%; target 70 by 2027-06-30; owner Lead organizer. Complete on paper. Target based on: Our own counts or records.

Indicator matrix

Clinics held (Output (what you did)). Unit clinics; baseline 0 (2026-07-01); target 48; actual 22 (2026-12-31); source Clinic calendar; collected Monthly; owner Organizer. Moving toward target (46%). Our own count; how it is observed: Count of clinics on the calendar; verified in a record.

Households attending hearing with a written plan (Near-term outcome). Unit % of households seen; baseline 35 (2026-07-01); target 70; actual 52 (2026-12-31); source Follow-up log (aggregate); collected Quarterly; owner Lead organizer. Moving toward target (49%). Required by the funder; defined by Riverbend Community Foundation reporting form (fictional); how it is observed: Organizer checks for a written plan at the follow-up call; observed by us.

People who would send a relative or neighbor to a clinic (Near-term outcome). Unit % of people asked; baseline unknown (no date); target -; actual - (no date); source Follow-up question, tally only; collected Quarterly; owner Tenant leaders. Cannot calculate: baseline or target missing. Defined with the community; defined by Tenant leaders at the March 2026 planning meeting (fictional); checked with Clinic participants at two report-back nights; how it is observed: One question at the follow-up call, asked by a tenant leader; tally only; told to us (self-report).

Households still in touch six months after their hearing (Mid-term outcome). Unit households; baseline unknown (no date); target -; actual - (no date); source Phone tree contact log (aggregate); collected Quarterly; owner Lead organizer. Cannot calculate: baseline or target missing. Defined with the community; defined by Tenant leaders and long-time phone tree members (fictional); checked with Clinic participants at two report-back nights; how it is observed: Phone tree log of who answered a check-in call; counted, no names reported; verified in a record.

Workplan

Train 6 tenant leaders: 2026-12-01 to 2027-01-31; owner Lead organizer; output 6 leaders trained.

Weekly notice clinics: 2027-02-01 to 2027-11-30; owner Organizers; output 40 clinics.

Court-day reminders and accompaniment: 2027-02-01 to 2027-11-30; owner Tenant leaders; output Hearings accompanied.

Board and compliance record

Quorum: More than half of 7 voting seats (bylaws) = 4.

Marisol Reyes (fictional), Chair: term 2024-01-01 to 2026-12-31 (Ends within 90 days); conflict statement signed 2026-01-20.

Darnell Price (fictional), Treasurer: term 2025-01-01 to 2027-12-31 (Current); conflict statement signed 2026-01-20.

Ana Lucero (fictional), Secretary: term 2025-01-01 to 2027-12-31 (Current); conflict statement signed 2026-01-20.

Joyce Whitfield (fictional), Tenant leader seat: term 2023-01-01 to 2025-12-31 (Term ended); conflict statement signed 2025-02-11.

Sam Okafor (fictional), Member: term 2026-01-01 to 2028-12-31 (Current); conflict statement signed 2026-01-20.

Meeting 2026-07-14: 5 present, quorum met; minutes adopted 2026-09-08. Approved FY27 budget.

Meeting 2026-09-08: 3 present, quorum NOT met; minutes adopted not yet. Discussed state application.

Meeting 2026-11-03: 5 present, quorum met; minutes adopted not yet. Accepted Riverbend award.

Disclosure: Darnell Price (fictional), Spouse works at the text reminder vendor, disclosed 2026-09-08; action: Stepped out of the vendor vote.

Filing: IRS Form 990-EZ (IRS, Federal) due 2027-05-15; not filed; source https://www.irs.gov/charities-non-profits/annual-exempt-organization-return-due-date, checked 2026-11-01.

Filing: Charitable registration renewal (State Attorney General (fictional state), Fictional state) due 2027-05-15; not filed; source not recorded.

Filing: Nonprofit annual report (Secretary of State (fictional state), Fictional state) due 2026-10-01; filed 2026-09-20; source https://example.org/sos-annual-report, checked 2026-08-15.

Fix: 1 board term has ended: Joyce Whitfield (fictional). Re-elect or update the roster before it goes to a funder.

Check: 1 term ends within 90 days. Put the election on the next agenda.

Check: 1 board member has no conflict-of-interest statement signed in the last 12 months. Form 990 Part VI asks whether you monitor conflicts each year, and many funders ask for the policy.

Fix: 1 meeting did not reach quorum (2026-09-08). Check your bylaws on what that means for any votes taken.

Check: Minutes from 2026-09-08 are not marked adopted, and a later meeting has happened.

Check: Charitable registration renewal: confirm the due date with State Attorney General (fictional state) and record the official link and the date you checked. Rules differ by state and fiscal year.

Filing dates and quorum rules come from your entries. Confirm them with the agency and your bylaws.

Grant pipeline and award management

Riverbend Community Foundation (fictional): Housing Stability Fund. Stage: Awarded, active. Requested $40,000; awarded $35,000. Deadline 2026-09-30; report due 2027-01-15; renewal 2027-09-30. Source https://example.org/housing-fund (checked 2026-09-02).

Report owner Dana Ortiz; closeout due 2027-12-15; final report submitted -.

Drawdown requested $8,750; received $0; not yet received $35,000; claim Claim submitted, waiting.

Budget $8,750, actual $10,100, variance $1,350. Cash gap = max(0, $17,5

Fix: Cash gap of $5,500 before the first payment. Stop and secure float, a smaller budget or an advance

before you spend.

Fix: Spending is 15.4% off budget. Write the reason before your next report.

State Housing Office (fictional): Tenant Outreach Grants. Stage: Drafting. Requested $60,000; awarded -. Deadline 2027-02-12; report due -; renewal -. Source https://example.org/state-outreach (checked 2026-10-20).

Report owner -; closeout due -; final report submitted -.

Drawdown requested -; received -; not yet received Unknown; claim -. Budget -, actual -. Cash gap = max(0, outlay before first payment" available float). Unknown until both

Lakeshore Family Foundation (fictional): Housing Stability Fund 2027 (fictional). Stage: Drafting. Requested -; awarded -. Deadline 2027-02-15; report due -; renewal -. Source not recorded (checked -).

Report owner -; closeout due -; final report submitted -.

Drawdown requested -; received -; not yet received Unknown; claim -. Budget -, actual -. Cash gap = max(0, outlay before first payment" available float). Unknown until both

Check: Record the official source link and the date you checked it.

Funder fit, relationships and hunches

Riverbend Community Foundation (fictional): stated priorities "housing stability for renters in the county" (from Housing Stability Fund guidelines, read 2026-09-02 (fictional)). Relationship: our joint clinic night with their grantee County Legal Aid (fictional) (consent to mention).

State Housing Office (fictional): stated priorities "outreach that helps renters understand their rights before a court date" (source not recorded). Relationship: a program officer who visited a clinic in 2025 (fictional) (not cleared to mention).

Lakeshore Family Foundation (fictional): stated priorities not recorded. Relationship: none recorded.

Hunch (Confirmed, may appear in drafts): Most renters who skip their hearing think the filing already means they must leave. Test: Ask at the next three clinics why people almost did not come. Evidence: Asked at three clinics in October 2026; 19 of 31 attendees said this, recorded as a tally only (fictional).

Hunch (Not tested yet, kept out of drafts): Text reminders work better in Spanish than in English. Test: Compare attendance by reminder language for one quarter.

Check: Say where State Housing Office (fictional)'s priorities come from (guidelines page, annual report, call with staff) and when.

Check: The relationship with State Housing Office (fictional) stays out of your letters until the person or group named agrees to be mentioned.

Check: Copy what Lakeshore Family Foundation (fictional) says it funds, in its own words, before you decide fit. Your mission is not the test; its stated priorities are.

Check: 1 hunch is not tested yet. They stay out of every draft. Write how you will check each one.

Reviewer red flags

Check: 1 partner named without a letter in hand. Do not describe a commitment you cannot show.

Fix: Annual budget does not match: $185,000 in this record, $185,000 on your website, $160,000 on Candid. Reconcile before you send.

Grant Builder drafts brought in

Drafted by the Grant Builder reader from the notice you pasted and the facts you gave it. DSG did not write or review it. Check every sentence before you use it.

Eastside Tenant Circle: Court Date Response (fictional) (Lakeshore Family Foundation (fictional)): 3 sections brought in 2026-11-09. Still missing: Signed letter from the legal aid partner; Budget period confirmed against the funder's grant year.

Board snapshot: What we set out to change

more households attend their hearing with a plan for renters with an eviction filing.

Board snapshot: Progress on our indicators (aggregate numbers only)

Clinics held: Moving toward target (46% of the way from baseline to target). Baseline 0, target 48, actual 22 clinics.

Households attending hearing with a written plan: Moving toward target (49% of the way from baseline to target). Baseline 35, target 70, actual 52 % of households seen.

People who would send a relative or neighbor to a clinic: Cannot calculate: baseline or target missing. Baseline unknown, target unknown, actual not recorded % of people asked.

Households still in touch six months after their hearing: Cannot calculate: baseline or target missing. Baseline unknown, target unknown, actual not recorded households.

Board snapshot: Grant money

Awarded and active or closed: $35,000.

Received so far: $0. Awarded but not yet received: $35,000.

Requested and still pending: $60,000. This is not money we have.

Match recorded: $5,000 cash, $3,200 in-kind, kept separate.

Board snapshot: Budget against actual

Riverbend Community Foundation (fictional): over budget by $1,350 (15.4%). Reason still needed.

Board snapshot: Context and risk (The Underneath)

Check (Legal requirement. Verify in your state): Directors must oversee the money with care under state nonprofit law. Chosen: Pay for treasurer training for a current member.

Fix (Funder preference, not law): Being paid after you spend leaves $5,500 you do not hold, about 0.4 months of your operating budget.

Board snapshot: Board and compliance

2025-12-31: Joyce Whitfield (fictional): board term ends (overdue)

2026-12-31: Marisol Reyes (fictional): board term ends

1 board term has ended: Joyce Whitfield (fictional). Re-elect or update the roster before it goes to a funder.

1 meeting did not reach quorum (2026-09-08). Check your bylaws on what that means for any votes taken.

Board snapshot: Due in the next 90 days

2027-01-15: Riverbend Community Foundation (fictional): report due

Board snapshot: Decisions the board may need to make

Riverbend Community Foundation (fictional): Cash gap of $5,500 before the first payment. Stop and secure float, a smaller budget or an advance before you spend.

Riverbend Community Foundation (fictional): Spending is 15.4% off budget. Write the reason before your next report.