IDENTIFYING FOUNDATION AND CORPORATE PROSPECTS
PRESENTER

Andrea Sanow, Development Coordinator at MCN
asanow@minnesotanonprofits.org
SESSION OBJECTIVES

Participants will:

- Have a deepened understanding of the funding sector
- Learn how to focus your search by screening a foundation's guidelines and process
- Find out who else receives its money; and
- Learn when and how to contact its staff.
AGENDA

- Overview on Charitable Giving Foundations
- Research Tips & Tools
- Building a Work Plan
IDENTIFYING CORPORATE AND FOUNDATION PROSPECTS

- Individual, Corporate and Foundation dollars are all growing
- Grantmakers can be easy to find
  - Compared with individuals or in-kind contributions
- Information is available from a variety of sources
- Guidelines are helpful, but grants lists may be a better indication of interest
- Accessibility and responsiveness varies
FOUNDATIONS: TYPES AND TRENDS
ROLE OF FOUNDATIONS

A Foundation is ...

- an entity established as a 501(c)(3) or charitable trust
- established by an individual, family, community or corporation
- principal purpose is to make grants to unrelated organizations, institutions or individuals for scientific, educational, cultural, religious or other charitable purposes
CHARITABLE GIVING LANDSCAPE

2018 contributions: $427.71 billion by source of contributions
(in billions of dollars - all figures are rounded)

- 68% Individuals $292.09 billion
- 18% Foundations $75.86 billion
- 9% Bequest $39.71 billion
- 5% Corporations $20.05 billion

Source: Giving USA 2018
FOUNDATION FACTS

- Minnesota is home to over 1,500 foundations
- The largest 40 foundations in Minnesota gave 80% of all grants in 2015
- Most foundations are small and have no or few staff
TYPES OF FOUNDATIONS

Family and Independent Private Foundations

- Founded by individual, family or group
- Assets and investment earnings are source of most grants
- Annual payout of at least 5% of assets
- Many smaller family foundations not staffed
TYPES OF FOUNDATIONS

Corporate Foundations and Giving Programs

- Foundations funded as separate legal entities
- Giving programs funded by corporate profits and subject to changing business conditions
- Many have a foundation and a giving program
TYPES OF FOUNDATIONS

Community and Public Foundations

- Publicly supported for the benefit of specific community, population or geographic region
- In addition to unrestricted assets, often have donor-advised funds
MINNESOTA FOUNDATIONS OVERVIEW

2019 Minnesota Grants Directory contains information on 111 Foundations, including:

- 20 Community
- 40 Corporate
- 51 Private
MINNESOTA FOUNDATIONS OVERVIEW

Bush Foundation
101 5th St. E, Ste. 2400
St. Paul, MN 55101-1315

Important Information
2017 Deadlines: See website for details
Types of Grants Awarded: Project, Operating, Sponsorship and Other (Fellowships)
Geographic Focus: Minnesota Statewide, North Dakota and South Dakota

Interests/Priorities
The Bush Foundation invests in great ideas and the people who power them in Minnesota, North Dakota, South Dakota and the 23 Native nations that share the geography. The Foundation aims to inspire and support creative problem solving to make these regions better for everyone.

The Foundation implements its vision through the following programs:
• Community Innovation and Leadership: Community Innovation and Leadership programs are awarded through competitive grant and fellowship processes open to all eligible applicants in the region. Grants support innovation through community-powered problem solving that allows communities to develop and test new solutions to community challenges.
• Community Creativity, Education, Native Nation Building, and Social Business Ventures: Each of these initiatives makes a handful of large investments every year to accomplish a particular goal.
• Ecosystem: Ecosystem grants sustain organizations that create unique and significant value for Bush Foundation grantees, Fellows, Rebuilders and more.
• Communications and Convenings: The Foundation shares stories of the people and organizations it invests in, and supports events that inspire, equip and connect people across the region.

Sample Grants to Minnesota Nonprofits in 2015
Largest Grant .................................................. $4,000,000
Smallest Grant .................................................. $1,000
Average Grant .................................................. $167,709
Black Hills Knowledge Network, Rapid City, SD ................................ $276,000
Black Hills Special Services Cooperative, Sturgis, SD .................. $4,000,000
Clay County Public Health, Moorhead ........................................ $200,000
Emaze, Sioux Falls, SD ........................................ $50,000
Grand Forks Housing Authority, Grand Forks, ND .................. $500,000
Independent Sector, Washington, D.C. ................................. $100,000
Lanesboro Arts Center, Lanesboro ........................................ $100,000
Nation Builders, Inc., Minneapolis ........................................ $500,000
Northside Achievement Zones, Minneapolis ......................... $200,000
Standing Rock Sioux Tribe, Fort Yates, ND ......................... $50,000

Financial Summary
For Fiscal Year 2015
Total Assets: $895,000,000
Total Grants: $32,518,493

Change in Assets FY 2015
Amount of Grants to Minnesota Nonprofits
-3% 72%

Grants By Activity Area
MINNESOTA FOUNDATIONS…

Paid $935 million total grants (from the 2019 Grants Directory)

% of Total Grants Paid

- Corporate: 27%
- Private: 28%
- Community: 45%
TYPES OF GRANTS

General Operating

- “Gen Op” is your whole mission - all that you do.

- Example: The Planeteers
  - Three programs: River clean-up, Environmental education, and public policy
  - One gen op grant from the Captain Planet Foundation could fund any part of their activities.
TYPES OF GRANTS

Program Support

- Program or project support focuses on one aspect of your work

- Example: The Planeteers
  - Has environmental stewardship training and off-site nature activities for teens
  - A proposal to any foundation would need to be specific on what it would cover – e.g. environmental stewardship training in the Minneapolis schools.
OTHER TYPES OF SUPPORT

- Planning or startup
  - Provides funds for programs/organizations that are just started

- Capital
  - Provides support for building, technology, vehicles

- Management or technical assistance grants
  - Address human capital of your staff and employees to help you perform at a higher level or accomplish your mission with greater skill or efficiency.

- In-Kind
  - Tangible donations, including meeting space or school supplies
IDENTIFYING CORPORATE AND FOUNDATION PROSPECTS

- Who cares about the world you care about?
- How do you find them?
- How do you first contact them?
- How do you win them over?
Grantmaker Criteria

- Geographic focus
- Areas of interest
- Intended beneficiaries
- Grant Type
- Grant Amount
- Grantee Characteristics

It’s all about making a good match!
RESEARCH: OTHER CONSIDERATIONS

**Corporate-Affiliated Grantmaking**

- Employee volunteerism (volume)
- Employees serving on your Board (depth)

*It’s still all about making a good match!*
RESEARCH: ITEMS TO REVIEW

- Foundation guidelines, priority/focus areas and deadlines
- Foundation history and giving pattern
- Staff and trustee lists
- Grant lists
- Tax returns – Form 990 (public charities) and Form 990-PF (private foundations)
RESEARCH: TOOLS AND IDEAS

- Word of mouth – talk to your colleagues
- Local newspapers and professional journals
- Donor lists from similar organizations
- Grantmaker annual reports
- Internet, grantmaker websites
- Searchable databases and grants directories
RESEARCH: TOOLS AND IDEAS

- Directories
  - Minnesota Grants Directory
  - Foundation Center: foundationcenter.org/findfunders
  - Access Philanthropy: www.accessphilanthropy.com
  - GrantAdvisor: www.grantadvisor.org
RESEARCH: TOOLS AND IDEAS

- Funding Information Network
  [http://foundationcenter.org/find-us#lookup_form](http://foundationcenter.org/find-us#lookup_form)

- Minnesota
  - West Central Initiative - Fergus Falls
  - Central Minnesota Community Foundation - St. Cloud
  - Willmar Area Community Foundation
  - Duluth Public Library - Duluth
  - Hennepin County Library – Minneapolis
  - Rochester Public Library – Rochester
  - St. Paul Public Library - St. Paul
RESEARCH: TOOLS AND IDEAS

- 990 Data
  - GuideStar: www.guidestar.org
  - Economic Research Institute (ERI)
    http://www.eri-nonprofit-salaries.com
Form 990-PF

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

For calendar year 2012 or tax year beginning , and ending

Name of foundation

<table>
<thead>
<tr>
<th>Name of foundation</th>
<th>Employer identification number</th>
<th>Telephone number</th>
</tr>
</thead>
<tbody>
<tr>
<td>PATRICK AND AIMEE BUTLER FAMILY FOUNDATION</td>
<td>41-6009902</td>
<td>651-222-2565</td>
</tr>
</tbody>
</table>

Number and street (or P.O. box number if mail is not delivered to street address)

<table>
<thead>
<tr>
<th>Number and street (or P.O. box number if mail is not delivered to street address)</th>
<th>Room/suite</th>
</tr>
</thead>
<tbody>
<tr>
<td>332 MINNESOTA STREET, E-1420</td>
<td>55101-1369</td>
</tr>
</tbody>
</table>

City or town, state, and ZIP code

<table>
<thead>
<tr>
<th>City or town, state, and ZIP code</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>ST. PAUL, MN 55101-1369</td>
<td></td>
</tr>
</tbody>
</table>

G Check all that apply:

<table>
<thead>
<tr>
<th>Check all that apply</th>
<th>Initial return</th>
<th>Final return</th>
<th>Address change</th>
</tr>
</thead>
<tbody>
<tr>
<td>□</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

D 1. Foreign organizations, check here □

D 2. Foreign organizations meeting the 85% test, check here and attach computation □

H Check type of organization:

<table>
<thead>
<tr>
<th>Check type of organization</th>
<th>Section 501(c)(3) exempt private foundation</th>
<th>Section 4947(a) exempt private charitable trust</th>
<th>Other charitable private foundation</th>
<th>Other taxable private foundation</th>
</tr>
</thead>
<tbody>
<tr>
<td>□</td>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Fair market value of all assets at end of year

<table>
<thead>
<tr>
<th>Fair market value of all assets at end of year (from Part II, col (c), line 16)</th>
<th>▶ $</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ 90,217,318.</td>
<td></td>
</tr>
</tbody>
</table>

J Accounting method:

<table>
<thead>
<tr>
<th>Accounting method</th>
<th>□ Cash</th>
<th>□ Accrual</th>
<th>□ Other (specify)</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Part I Analysis of revenue and expenses

<table>
<thead>
<tr>
<th>Percent of change compared to the same period of the immediately preceding year</th>
<th>1 Contributions, gifts, grants, etc., received</th>
<th>2 Check ▶ □ if the foundation is not required to attach Sch B</th>
<th>(a) Revenue and expenses per books</th>
<th>(b) Net investment income</th>
<th>(e) Adjusted net income</th>
<th>(d) Disbursements for charitable purposes (cash basis only)</th>
</tr>
</thead>
<tbody>
<tr>
<td>▶ 747,666.</td>
<td></td>
<td>N/A</td>
<td></td>
<td>N/A</td>
<td>N/A</td>
<td>14.5%</td>
</tr>
</tbody>
</table>

© Minnesota Council of Nonprofits, St. Paul, Minnesota
www.minnesotanonprofits.org
<table>
<thead>
<tr>
<th>Description</th>
<th>Amount 1</th>
<th>Amount 2</th>
<th>Amount 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Gross profit or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Other income</td>
<td>30,853.</td>
<td>0.</td>
<td></td>
</tr>
<tr>
<td>3. Total, Add lines 1 through 1</td>
<td>5,114,705.</td>
<td>4,336,186.</td>
<td></td>
</tr>
<tr>
<td>4. Compensation of officers, directors, trustees, etc.</td>
<td>84,675.</td>
<td>0.</td>
<td>84,675.</td>
</tr>
<tr>
<td>5. Other employee salaries and wages</td>
<td>58,431.</td>
<td>22,987.</td>
<td>35,444.</td>
</tr>
<tr>
<td>7. Legal fees</td>
<td>4,500.</td>
<td>0.</td>
<td>4,500.</td>
</tr>
<tr>
<td>8. Accounting fees</td>
<td>21,500.</td>
<td>10,750.</td>
<td>10,750.</td>
</tr>
<tr>
<td>9. Other professional fees</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10. Interest</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11. Taxes</td>
<td>68,880.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>12. Depreciation and depletion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Travel, conferences, and meetings</td>
<td>4,879.</td>
<td>930.</td>
<td>3,949.</td>
</tr>
<tr>
<td>15. Printing and publications</td>
<td>147.</td>
<td>147.</td>
<td>0.</td>
</tr>
<tr>
<td>17. Total operating and administrative expenses. Add lines 13 through 23</td>
<td>537,139.</td>
<td>285,395.</td>
<td>182,864.</td>
</tr>
<tr>
<td>18. Contributions, gifts, grants paid</td>
<td>3,015,405.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

20. Subtract line 26 from line 12:
   a. Excess of revenue over expenses and disbursements                      | 1,562,161.  |             |             |
   b. Net investment income (if negative, enter -0-)                          |             | 4,050,791.  |             |
   c. Adjusted net income (if negative, enter -0-)                            |             |             | N/A         |
<table>
<thead>
<tr>
<th>Name and Address</th>
<th>Title and Avrg Hrs/Wk</th>
<th>Compensation</th>
<th>Employee Ben Plan Contrib</th>
<th>Expense Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Peter M. Butler</td>
<td>Treasurer &amp; Trustee</td>
<td>2.00</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>332 Minnesota St, E-1420</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ST Paul, MN 55101</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patrick Butler, Jr.</td>
<td>Vice-President &amp; Trustee</td>
<td>1.00</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>332 Minnesota St, E-1420</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ST Paul, MN 55101</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John K. Butler</td>
<td>President &amp; Trustee</td>
<td>3.00</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>332 Minnesota St, E-1420</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ST Paul, MN 55101</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brigid M. Butler</td>
<td>Trustee</td>
<td>1.00</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>332 Minnesota St, E-1420</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ST Paul, MN 55101</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Patricia M. Butler</td>
<td>Trustee</td>
<td>1.00</td>
<td>0.0</td>
<td>0.0</td>
</tr>
<tr>
<td>332 Minnesota St, E-1420</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ST Paul, MN 55101</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paul C. Butler</td>
<td>Trustee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>332 Minnesota St, E-1420</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ST Paul, MN 55101</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Name</td>
<td>Position</td>
<td>Hours</td>
<td>Rate</td>
<td>Salary</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------</td>
<td>-------</td>
<td>-------</td>
<td>--------------</td>
</tr>
<tr>
<td>SANDRA K. BUTLER</td>
<td>TRUSTEE</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>SUZANNE A. LEEFEVOUR</td>
<td>TRUSTEE</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>CATHERINE C. BUTLER</td>
<td>SECRETARY &amp; TRUSTEE</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>KERRIEANNE BLEVINS</td>
<td>FOUNDATION DIRECTOR</td>
<td>24.00</td>
<td>0.00</td>
<td>[Redacted]</td>
</tr>
<tr>
<td>MELANIE MARTINEZ</td>
<td>TRUSTEE</td>
<td>1.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
FORM 990-PF  GRANT APPLICATION SUBMISSION INFORMATION  STATEMENT 17
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

KERRIE BLEVINS, FOUNDATION DIRECTOR
332 MINNESOTA ST, SUITE E-1420
ST PAUL, MN 55101-1369

TELEPHONE NUMBER

651-222-2565

EMAIL ADDRESS

BUTLERFAMILYFOUNDATIONREPORTS@GMAIL.COM

FORM AND CONTENT OF APPLICATIONS

SEE ATTACHED FOR HOW TO APPLY INSTRUCTIONS - ATTACHMENT A
The grant list gives critical information on the type of organizations funded, the typical grant size, and may also show the type of grant the foundation prefers to give.

<table>
<thead>
<tr>
<th>Organization Name</th>
<th>Paid Date</th>
<th>Grant Type</th>
<th>Grant Paid in 2012</th>
<th>Committed for 2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>African American Family Services</td>
<td>10/30/2012</td>
<td>general operations</td>
<td>$10,000</td>
<td>$0</td>
</tr>
<tr>
<td>2616 Nicollet Ave.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minneapolis, MN 55408</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Afton Historical Society Press</td>
<td>10/30/2012</td>
<td>Minnesota Modern Six Artists of the Twentieth Century</td>
<td>$5,000</td>
<td>$0</td>
</tr>
<tr>
<td>PO Box 100</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Afton, MN 55001</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Aun Dah Yung</td>
<td>10/30/2012</td>
<td>general operations</td>
<td>$10,000</td>
<td>$0</td>
</tr>
<tr>
<td>1089 Portland Avenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>St Paul, MN 55104</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Amherst H. Wilder Foundation</td>
<td>10/30/2012</td>
<td>the Jackson Street Village Supportive Services</td>
<td>$20,000</td>
<td>$0</td>
</tr>
<tr>
<td>451 Lexington Pkwy N</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>St. Paul, MN 55104</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avenues for Homeless Youth</td>
<td>10/30/2012</td>
<td>general operations</td>
<td>$25,000</td>
<td>$0</td>
</tr>
<tr>
<td>1708 Oak Park Avenue N.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minneapolis, MN 55411</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bell Museum of Natural History</td>
<td>10/29/2012</td>
<td>Changing Exhibitions Program</td>
<td>$7,500</td>
<td>$7,500</td>
</tr>
<tr>
<td>10 Church St. SE</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Minneapolis, MN 55455</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Brattleboro Area Drop In Center</td>
<td>10/30/2012</td>
<td>general operations</td>
<td>$16,500</td>
<td>$0</td>
</tr>
<tr>
<td>PO Box 175</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
RESEARCH: TOOLS AND IDEAS

- GrantAdvisor.org
  - Reviews of grantmaking foundations
  - Blog posts about trends from the site and the philanthropic sector
Latest Reviews of Funders

**Ordean Foundation** - Duluth, MN - 4 Survey Respondents
"After having very little information to go on (a 2015 990) and several unanswered phone calls, I sent a 4-page overview to the foundation. I ended up"
[Read More](#)

[Write a Review](#)

**Rock Island Community Foundation** - Rock Island, IL - 15 Survey Respondents
"This funder is very community minded. They care about the community and fund organizations or programs that need the grant."
[Read More](#)

[Write a Review](#)
Purpose: Encourage more successful philanthropy and facilitate open dialogue about grantmaking

Anonymous survey feedback on grantmakers
- 667 grantmakers with reviews
- 1,960 Total reviews

Online responses from participating funders
- 220 have signed up to respond to reviews*

*As of 8/12/2019
Bush Foundation

Location: 10156 E. St. E, Ste. 2400 St. Paul MN 55101
Phone: 651-227-0897
Fax: 651-207-6485
Website: www.bushfoundation.org

Overview

What was the overall relationship with the funder?

- 78% Satisfied
- 22% Dissatisfied

How many hours did the grant application process take?

- Median: 20 hours
- Less than 5 hours: 1
- 5 to 10 hours: 3
- 10 to 15 hours: 2
- More than 15 hours: 11

How would you rate this funder's accessibility?

- 83% Accessible
- 17% Inaccessible

How successfully do you think the funder is accomplishing its current philanthropic goals?

- 50% Successfully
- 50% Ineffectively

Top descriptors for this funder:

- 4 Positive leader in the field
- 4 Culturally sensitive
- 3 Positive leader in the field
- 3 Friendly
- 2 Positive leader in the field
- 2 Culturally sensitive
- 2 Positive leader in the field
- 2 Ineffectively
- 1 Not worth the time to pitch
- 1 Opportunity
- 1 Sensitive
- 1 Friendly

Advice from a Friend

July 18, 2017
Reviewer 825 - Grant Applicant - applied in 2016
Bush Foundation really knows what it is doing and is VERY thorough indeed. Impressed by their understanding of non-profits and the work the Foundation does.

Pros
- Positive leader in the field
- Does more than money
- Culturally sensitive
- Insightful
- Builds relationships
- Openminded

Response from Bush Foundation

Jul 19, 2017
Thankyou

July 23, 2017
Reviewer 827 - Grant Applicant - applied in 2016
The Community Innovation Grant program is NOT a great way to try to secure funds for your existing work - either general operating or program. No matter how skilled you are at making your existing work look like the hottest new thing, they'll see through it. They're really looking to fund new ideas that are shared by multiple groups within a community. If you're serious about this grant opportunity, get ready to split the grant amount with at least one another nonprofit/group.

Pros
- Culturally sensitive
- Friendly
- Builds relationships
- Openminded

Response from Bush Foundation

Jul 30, 2017
Thankyou
6. Advice to a colleague:

Imagine a trusted nonprofit colleague is thinking of approaching this funder. S/he asks what you think they should know as they start their quest.

Sample response: It's probably best to try to have a meeting or a call before you apply, but it's hard to get a meeting or call unless you have an 'in'.
Reviewer 9181 - Grant Applicant - applied in 2016
“Take advantage of the opportunities to gain insight on the grantmaking process as well as feedback if you don't get the grant. The webinars and opportunities to talk with individuals at the foundation are very helpful.”

Reviewer 649 - Grant Applicant - applied in 2017
“Even though the guidelines state that they will fund a potential project at any stage of development - if you are past the planning stage, don't bother applying.

Response from Bush Foundation
“Sorry to hear you feel this way. We strongly encourage organizations to reach out to staff and set up time to talk before going through all the work it takes to fill out an application.”
Reviewer 278 - Grant Applicant - applied in 2016

If you had one piece of advice to give to this funder (about grantmaking or anything else), what would it be?

“Mr. Otto Bremer was an immigrant who found success in banking. My challenge to the foundation is to reconnect with his roots by investing more in refugees and immigrants. Minnesota is a hub to some of the largest immigrant groups, namely, Hmong and Somali. With all of the negativity in the news surrounding DACA, undocumented workers, Islamophobia, etc., the Foundation should stand take more leadership in this area.”
BENEFITS TO NONPROFITS

1. Free access to information

2. More effective work plans and proposals

3. Time savings

4. New revenue!
BUILDING A GRANTS WORK PLAN
BUILDING A GRANTS WORK PLAN

- Research funding landscape
- Identify prospects; deeper research
- Align prospects with your cases/funding needs
- Break down cultivation strategy
MOVES MANAGEMENT

Identification

Stewardship       Research

Solicitation      Cultivation
Before submitting Application:
- Phone Call
  - Letter
  - Meeting
  - Application
  - Follow-Up phone call
    - Meeting/Site Visit
      - Supplemental Information

Application Submission:
- Telephone Call
  - Letter
  - Full Proposal
  - Common Grant Application

While Pending Decision:
- Meeting/Site Visit
  - Supplemental Information
  - Phone Call
    - Letter

Decision:
- Yes
  - Thank You Letter
  - Meeting/Site Visit
  - Reporting
- No
  - Thank you letter
  - On-Going Communication

After Decision:
- Thank you letter
- On-Going Communication
# BUILDING A GRANTS WORK PLAN

## Sample Grants Work Plan

<table>
<thead>
<tr>
<th>Foundation</th>
<th>Goal</th>
<th>Strategy &amp; Action</th>
<th>Who Leads</th>
<th>When</th>
<th>Deadline</th>
<th>Strength</th>
</tr>
</thead>
<tbody>
<tr>
<td>Otto Bremer Trust</td>
<td>$50,000</td>
<td>*Determine alignment between funding priorities and organization's work</td>
<td>*Grant Writer</td>
<td>October</td>
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<td></td>
<td></td>
<td>*Develop project budget and logic model</td>
<td>*Grant Writer, Program Director</td>
<td>November</td>
<td>Apr 11 2017</td>
<td>Strong</td>
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<tr>
<td></td>
<td></td>
<td>*Prospect call with Program Officer</td>
<td>*Executive Director, Grant Writer</td>
<td>December</td>
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<td></td>
<td></td>
<td>*Draft proposal content; submit to Program Director for review</td>
<td>*Grant Writer, Program Director</td>
<td>January-March</td>
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<td></td>
<td></td>
<td>*Finalize &amp; submit</td>
<td>*Grant Writer</td>
<td>April</td>
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<tr>
<td>Blandin Foundation</td>
<td>$10,000</td>
<td>*Review last year’s case materials &amp; see what language can be repurposed/needs updating</td>
<td>*Grant Writer</td>
<td></td>
<td>Sept 15 2017</td>
<td>Strong</td>
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<td></td>
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<td>*Determine &quot;new work&quot; that aligns with funder priority</td>
<td>*Grant Writer, Program Director</td>
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<tr>
<td></td>
<td></td>
<td>*Prospect call with Program Officer</td>
<td>*Executive Director, Grant Writer</td>
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<td></td>
<td></td>
<td>*Write proposal content, finalize, &amp; submit</td>
<td>*Grant Writer</td>
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PLANNING FOR GRANT SEEKING

- The Grants Calendar
- Plan to start “courting” donors 6 months before you submit a proposal.
- Review Grants Calendar with your Board and Staff -- are there connections?
- Be aware of big due dates; plan work accordingly!
## MAY FUNDRAISING CALENDAR

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<tr>
<th>Sunday</th>
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<td><strong>Target App. Due</strong></td>
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<td>Strategic Disc. w/ Phillips Fdtn.</td>
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<td><strong>Otto Bremer Report Due</strong></td>
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<td><strong>Xcel Energy App Due</strong></td>
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FUNDER RANKING

- Mission alignment?
- Geographic alignment?
- Capacity to give?
- Open application?
- Connection with your organization?
SUSPECTS AND PROSPECTS

- **Suspect**
  - Any idea for a funder
  - Keep an ongoing list, wherever it comes from.

- **Prospect**
  - Has a timeline and strategy attached to it
THE DISCOVERY CALL...

- Do Not:
  - Present your entire proposal
  - Give laundry lists
  - Ask the program officer to write your proposal for you
  - Make assumptions from ambiguity

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THE DISCOVERY CALL...

Do:

- Pitch your idea with clear connections to what you believe are their goals
- Ask about:
  - Acceptance ratios and grant range
  - Application process variance
  - Decision structure
  - Decision making timeline
IF EVERYTHING GOES WELL...

Grantwriting: Getting the Most Out of Your Grant Proposal

11:15-12:30pm
Thank you!