



# Grantseeker's Guide to the Galaxy

The Latest Tips, Tricks, and Trends

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# Overview

1. Updates in the field
2. Prospect research
3. Tools and methods of tracking grants
4. Professional development



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## Updates in the field

- Funding prospects and funders
- Minnesota Council of Nonprofits & Minnesota Council of Foundations
- Local newspapers
- National landscape: Chronicle of Philanthropy, Nonprofit Quarterly
- Commentators: PEAK Grantmaking, Center for Effectively Philanthropy, GrantAdvisor, Nonprofit AF



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# Prospect Research

*Applying Moves Management and other tactics to move from prospect to suspect*

- Identification
  - Public information:
    - Prospect research databases
    - Cohort analysis
    - Free access to databases
    - When to invest in paid subscriptions



# Prospect Research - Paid Subscriptions

Product	Website	Pricing	Notes
Candid. Foundation Center – Foundation Directory Online (FDO)	<a href="https://online.foundationcenter.org/">https://online.foundationcenter.org/</a>	<ul style="list-style-type: none"><li>• Pro - \$199 for 1 month, \$1499 for 1 year</li><li>• Essential - \$49 for 1 month, \$399 for 1 year</li></ul>	Free access at the library
FoundationSearch	<a href="http://www.foundationsearch.com/">http://www.foundationsearch.com/</a>	Call for quote	
GrantStation	<a href="https://grantstation.com/">https://grantstation.com/</a>	~\$149 / year	Free for GPA members Discount for MCN members
Thomson Grants' GrantScape	<a href="https://www.thegrantscape.com/">https://www.thegrantscape.com/</a>	\$99 for 1 month, \$588 for 1 year	
GrantWatch	<a href="https://www.grantwatch.com/plans.php">https://www.grantwatch.com/plans.php</a>	\$18 for 1 week, \$45 for 1 month, \$199 for 1 year	
Instrumentl	<a href="https://www.instrumentl.com/">https://www.instrumentl.com/</a>	\$82 for 1 month, \$900 for 1 year	
Grant Gopher	<a href="https://grantgopher.com/">https://grantgopher.com/</a>	<ul style="list-style-type: none"><li>• \$9 for 1 month</li><li>• \$49 / month including assistance</li></ul>	
GrantForward	<a href="https://www.grantforward.com/index">https://www.grantforward.com/index</a>	\$1000 for 1 year and up	
Included with Grant Management Solutions (e-Civis, GrantHub)	<a href="https://www.ecivis.com/">https://www.ecivis.com/</a> <a href="https://grantseekers.foundant.com/">https://grantseekers.foundant.com/</a>	e-Civis - call for quote GrantHub - \$75 / month, \$795 / year	e-Civis: funders for state, local or tribal governments <b>GrantHub:</b> includes GrantStation & 'Who Funded this Organization' feature
National Council of Nonprofits Comparison	<a href="#">National Council of Nonprofits Comparison</a>		



# Prospect Research (continued)

*Applying Moves Management and other tactics to move from prospect to suspect*

- Qualification
  - Check eligibility based on location, activity area, and constituency served
  - Who are the foundation's other grantees?
    - Annual reports, Guidestar, and Economic Research Institute
  - Who hasn't the organization funded?
    - GrantAdvisor
- Cultivation
  - Read the guidelines, check GrantAdvisor (again!)



## Prospect Research (continued)

*Applying Moves Management and other tactics to move from prospect to suspect*

- Submit! (Solicitation)
  - On time, ahead of time, make sure you know the deadline
- Stewardship
  - Saying “thank you”
  - Asking for feedback
  - Following up



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## Breakout - Ask Your Neighbor...

Ideal process if you have one?

How much time do you spend and how often do you do prospect research?

Do you use any of the tools? Which ones do you like?

Do you have some that weren't listed?

[3-4 minutes to chat with your neighbor, share 1-2 ideas]





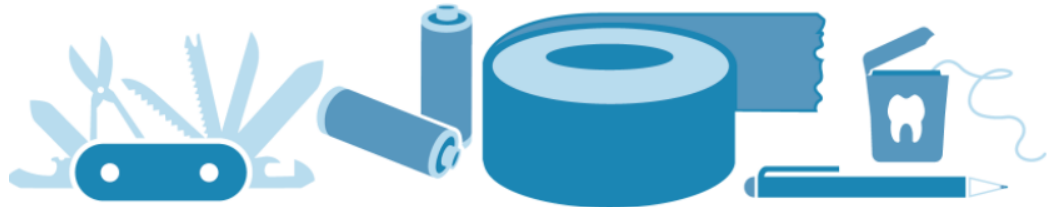
## Four Approaches to Grant Management

1. Spreadsheet + Calendar + Misc
2. Leverage Existing Donor Management System (DMS) or Contact Relationship Management System (CRM)
3. Purchase a Grant Management Solution
4. Build your Own Solution



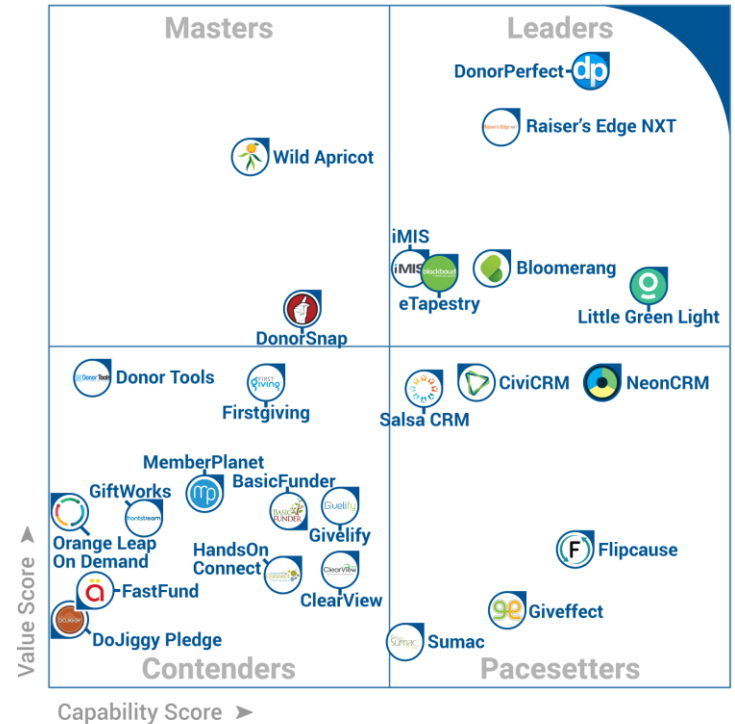
## Spreadsheet + Calendar + Misc.

- Microsoft Excel Spreadsheets / Google Sheets / Smartsheet
- Email and Calendar System
- Task Manager (Stickies / Whiteboard / Asante / Trello, etc.)
- Document Storage (Google Docs / DropBox, etc.)
- Donor or Contact Management System (see next slide)



# Donor Management Solutions

- Donor Management Systems
- Contact Relationship Management
- Contact Management Systems
- Email Systems
- Idealware Reports & Comparisons
  - <http://www.idealware.org/reports/consumers-guide-low-cost-donor-management-systems/>





# A Grant Management Solution

## What Are Common Features of Grant Management Software?

Grant management software systems can include any or all of the following functions to assist users:

<b>Grant discovery</b>	Automatically searches grant sources and alerts users when applicable grant opportunities appear.
<b>Proposal creation</b>	Maintain a library of common responses and attachments to use in grant applications.
<b>Pipeline management</b>	Submit grant proposals and track their progress.
<b>Document management</b>	Store all of your proposals and forms digitally in a central and searchable repository.
<b>Compliance management</b>	Monitor nonprofit compliance with ongoing grant requirements.
<b>Task/deadline reminders</b>	Assign grant-related tasks to individual users and receive notifications for upcoming deadlines.
<b>Financial reporting</b>	Analyze your grant win percentage and how much funding your nonprofit receives from grants.



# Purchase a Grant Management Solution

## Focused Pre-Award (Funder/Grant/Report Tracking)

1. Foundant's GrantHub
2. Altum's PhilanTrack
3. Instrumentl
4. Fluxx

## Focused Post-Award (Financial Tracking)

1. StreamLink's Amplifund
2. GrantVantage
3. Grant Maximizer
4. eCivis

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# Confusion - Grant Management for FUNDERS

1. Foundant Grant Lifecycle Manager (GLM)
2. BlackBaud / MicroEdge Gifts Online
3. WizeHive
4. Fluxx
5. FluidReview
6. ZoomGrants
7. SurveyMonkey Apply
8. Submittable
9. SmartSelect
10. ...







# What Option is Right for You?

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## Do you spend 2+ hours a month ...?

- Searching for wording or attachments from past grants to reuse.
- Reminding colleagues about upcoming and past due tasks.
- Building reports detailing your grant fundraising progress (monthly, year to date).
- Maintaining your spreadsheets, calendar, whiteboard, etc.

## Metrics to Help Support an ROI

- Number of grants you apply for
- Number of grants you are awarded
- Number of funders (New & Past)
- Type of funders (Corporate, Foundations, Gvmt)
- Collaboration needs of your 'grant team'
- Use of outside grant professionals
- Reporting requirements
- Financial & Grant expense tracking
- Integration with other systems
- Budget, time, resources available
- Support for solution internally



# What Option is Right for You?

- **Opportunity Costs:** Have you ever missed a grant application deadline? A report due date?
- **Capacity:** Do you struggle to quickly articulate the work required to successfully execute on your grant process to meet your fundraising plan?
- **Strategic Growth:** Are you looking for strategies to be more effective, to increase the maturity of your grant process?
- **Funder Support:** If you present your need for a better solution, you could get assistance with related costs. Here is an outline of how to approach this:

<https://resources.foundant.com/granhub-documents/gearing-up-for-capacity>





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## Poll: What are You Using to Manage Your Grants/Funders?

- Spreadsheets, Calendars, Binders, File systems
- Donor Management System / Contact Relationship System
- In-house, Custom-built Solution / Database
- Nothing Yet



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# Professional Development

1. GPA
2. Minnesota Council of Nonprofits
3. YNPN
4. Showing up to networking events
5. #GrantChat
6. Other educational resources



# Professional Development - Resources

Opportunities for Grant Professional Association (GPA) members: <https://www.grantprofessionals.org/>

- GPA GrantZone: Community discussion groups. by SIG group. Very active.
- GPA Webinars: \$49/non-members (members free) Live or recorded <https://www.grantprofessionals.org/webinars>
- GPA Mentor Match Program: <https://www.grantprofessionals.org/gpamentormatch>
- GPA MN Northstar Chapter: <https://www.grantprofessionals.org/content.asp?admin=Y&contentid=228>
- National GPA Conference: November 6-9, 2019; Washington DC, <https://www.grantprofessionals.org/conference>

Grant Professional Certified (GPC) Credential from the Grant Professionals Certification Institute (GPCI)

- GPCI: Website and newsletter signup link: <https://www.grantcredential.org/signup/>
- GPC: Competencies & Skills: <https://www.grantcredential.org/the-exam/competencies-tested/>
- Webinar/worksheet: Doing a Self Assessment for Professional Development: <https://resources.foundant.com/education-webinars-for-grantseekers/planning-your-own-pathway-to-grant-guru-3>

Foundant Technologies Educational Resources for Grantseekers: <https://grantseekers.foundant.com/>

- Articles, Blogs and Free Webinars: <https://resources.foundant.com/grantseeker-resources>
- Commonly Asked Questions on Online Applications

# Professional Development - Other Resources



- GrantAdvisor - <https://grantadvisor.org/> Review and advice on applying to funders
- Nonprofit AF - <http://nonprofitaf.com/> Humorous blogs by Vu Le
- Candid. - <https://learn.guidestar.org/update-nonprofit-report> Update your GuideStar Profile
- IdealWare - <https://www.idealware.org/> 3rd party research on nonprofit technology
- TechSoup - <https://www.techsoup.org/> discounted products and services for nonprofits
- Great Nonprofits - <https://greatnonprofits.org/> Yelp/TripAdvisor for nonprofits – top rated nonprofits
- National Council of Nonprofits – <https://www.councilofnonprofits.org/tools-resources> nonprofit resources
- SmartEGrants - <http://smartegrants.com/> blogs, professional development on grant skills, grantchat group
  - Twitter group #grantchat - weekly grant discussions, every Tuesdays at 11 am <http://grantchat.org/>
  - Facebook group - <https://www.facebook.com/smartegrants>
- DH Leonard Consulting - <https://www.dhleonardconsulting.com/> grant readiness assessment, blogs, etc.
- Grammarly - <https://www.grammarly.com/> Saves time in editing and reviewing
- GrantsMagic U <https://u.grantsmagic.org/> Table of Contents for the [Ultimate Grants Toolkit](#)



# Thank you!

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