Grantwriting 102: More Than the Basics... but Some of the Basics, Too

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she/her/hers
communications manager (formerly development coordinator)
Session Objectives

Participants will:

- Have a deepened understanding of the funding sector, specifically foundations
- Borrow the tools of MOVES management to help streamline prospect research
- Walk away with some tools and methods of tracking grants and engaging with professional development resources
- Identify places where they can join the conversation surrounding philanthropy
Agenda

1. Overview on foundations and charitable giving
2. MOVES management and prospect research
3. ProfessioTools and methods of tracking grants
4. Professional development resources
5. Join a conversation: where are you getting information?
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
Trends in the 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
NPQ’s Illustrated Nonprofit Economy
3rd Edition
by Jon Pratt (NPQ contributing editor) and Kari Annestad (contributing writer)

Sources

Federal government $491 billion
State and local government $187 billion
Individuals $265 billion
Foundations $44 billion
Donor-advised funds $15 billion
Interest, dividends, and sale of assets $36 billion
Recipient requests $32 billion
Corporations $18 billion
Federated drives $15 billion

Recipients

Education $125 billion (71,445)
Community services $114 billion ($3,333)
Religious congregations $100 billion (282,000)
Arts $44 billion (45,831)
International $44 billion (9,819)
Environment, animals $20 billion (21,062)


Total Assets (in $ billions, 2015)

Hospitals and nursing homes
Higher education
Human services
Health
Education
Community services
Religious congregations
Arts
International
Environment, animals

Program fees from private sources $1 trillion
Hospitals and nursing homes $964 billion (6,505 organizations)
Identifying Corporate and Foundation Prospects

- Individual, Corporate, and Foundation dollars are all growing
- 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
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

https://swifoundation.org/giving-options/why-give/community-foundations/
Trends: 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

% of Total Grants Paid

- Corporate: 27%
- Private: 45%
- Community: 28%

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

- A turn to “asset-based” language
- Participatory Grantmaking
- Capacity-building grants vs general operating
- Changing priorities
- Donor Advised Funds
Prospect Research: Quick tips

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

1. Identification
2. Qualification
3. Cultivation
4. Submit! (Solicitation)
5. Stewardship (stay tuned for the next session “Beyond the Final Report: New Ideas for Funder ‘Stewardship’”)
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<thead>
<tr>
<th>Product</th>
<th>Website</th>
<th>Pricing</th>
<th>Notes</th>
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<tbody>
<tr>
<td>Candid, Foundation Center</td>
<td><a href="https://fconline.foundationcenter.org/">https://fconline.foundationcenter.org/</a></td>
<td>Pro: $199 / 1 mo, $1499 / 1 yr Essential: $49 / 1 mo, $399 / 1 yr</td>
<td>Free access at the library</td>
</tr>
<tr>
<td>FoundationSearch</td>
<td><a href="http://www.foundationsearch.com/">http://www.foundationsearch.com/</a></td>
<td>Contact for pricing</td>
<td></td>
</tr>
<tr>
<td>GrantStation</td>
<td><a href="https://grantstation.com/">https://grantstation.com/</a></td>
<td>~$150 / yr (List price $699 - typically on sale)</td>
<td>Free for GPA members Discount for MCN members</td>
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<tr>
<td>Thomspson Grants’ GrantScape</td>
<td><a href="https://www.thegrantscape.com/">https://www.thegrantscape.com/</a></td>
<td>$99 / 1 mo, $588 / 1 yr</td>
<td></td>
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<tr>
<td>GrantWatch</td>
<td><a href="https://www.grantwatch.com/plans.php">https://www.grantwatch.com/plans.php</a></td>
<td>$18 / 1 wk, $45 / 1 mo, $199 / 1 yr</td>
<td></td>
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<tr>
<td>Grant Gopher</td>
<td><a href="https://grantopher.com/">https://grantopher.com/</a></td>
<td>$9 / 1 mo; or $49 / mo w/ assistance</td>
<td></td>
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<tr>
<td>GrantForward</td>
<td><a href="https://www.grantforward.com/index">https://www.grantforward.com/index</a></td>
<td>$1000 / 1 yr and up</td>
<td></td>
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<tr>
<td>Pivot by ProQuest</td>
<td><a href="https://pivot.proquest.com/">https://pivot.proquest.com/</a></td>
<td>Contact for pricing – for Institutions</td>
<td>Libraries, Universities, Research</td>
</tr>
<tr>
<td>National Council of Nonprofits</td>
<td>National Council of Nonprofits Comparison</td>
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<td>Comparison on Solutions</td>
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**Search Included with Grant Management Solutions**

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<tr>
<td>GrantHub by Foundant</td>
<td><a href="https://grantseekers.foundant.com/">https://grantseekers.foundant.com/</a></td>
<td>$75 / mo, $795 / year</td>
<td>includes GrantStation &amp; Who Funds this Nonprofit? feature</td>
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<tr>
<td>Instrumentl</td>
<td><a href="https://www.instrumentl.com/">https://www.instrumentl.com/</a></td>
<td>$82 / 1 mo, $900 / 1 yr</td>
<td></td>
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<tr>
<td>Fluxx GrantSeeker</td>
<td><a href="https://www.fluxx.io/">https://www.fluxx.io/</a></td>
<td>$70 / 1 mo; $756 / year</td>
<td>state, local or tribal governments</td>
</tr>
<tr>
<td>e.Civis</td>
<td><a href="https://www.ecivis.com/">https://www.ecivis.com/</a></td>
<td>Contact for pricing</td>
<td></td>
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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
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
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
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:

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

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

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

**Includes Post-Award**
(Financial Tracking)

1. StreamLink’s Amplifund
2. GrantVantage
3. Grant Maximizer
4. eCivis
What Option is Right for You?

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/granthub-documents/gearing-up-for-capacity
Where to connect with others

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/](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](https://www.grantprofessionals.org/webinars)
- GPA Mentor Match Program: [https://www.grantprofessionals.org/gpamentormatch](https://www.grantprofessionals.org/gpamentormatch)
- GPA MN Northstar Chapter: [https://www.grantprofessionals.org/content.asp?admin=Y&contentid=228](https://www.grantprofessionals.org/content.asp?admin=Y&contentid=228)
- National GPA Conference: November 6-9, 2019; Washington DC, [https://www.grantprofessionals.org/conference](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/](https://www.grantcredential.org/signup/)
- GPC: Competencies & Skills: [https://www.grantcredential.org/the-exam/competencies-tested/](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](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/](https://grantseekers.foundant.com/)
- Articles, Blogs and Free Webinars: [https://resources.foundant.com/grantseeker-resources](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
- 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://smarteegrants.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/smarteegrants
- DH Leonard Consulting - https://www.dhlenardconsulting.com/ grant readiness assessment, blogs, etc.
- Grammerly - https://www.grammarly.com/ Saves time in editing and reviewing
- GrantsMagic U https://u.grantsmagic.org/ Table of Contents for the Ultimate Grants Toolkit
Join a conversation

- 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
Thank you!

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