

An Overview of Foundations for Grant Writers

February 9, 2012
We will start at 3:30 p.m. EST

Presenter



Joanna Nixon

Moderator



Magda Hageman-Apol

WEBINAR TIPS

Did you know?

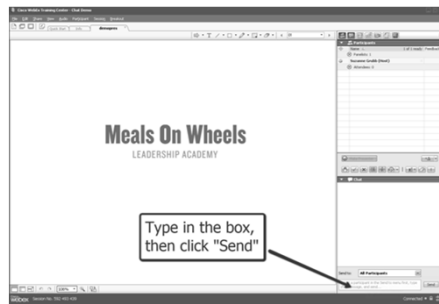
- To hear the moderator and presenter you need to phone in:
 - 1/866-410-2477; Conference Code: 9335278 #
- Your phones are muted upon entry, so we don't hear background noises from your offices.
- If you have a question you can unmute your phone by pressing *6

Welcome to An Overview of Foundations for Grantwriters

Take a moment to introduce yourself:

1. What is your position or job title?
2. What is the name and location of your program?
3. How many clients does your program serve in a day?

*Please type your responses in the webinar "Chat" box...
Make sure "Sent to" says "All participants" and click "Send"*



3

An Overview of Foundations

Session at a Glance

Part I: An Overview of Foundations: February 9 (3:30-4:30pm EST)

- History of Foundations
- The different types of Foundations that exist
- Researching foundations that are a match for your organization and programs
- Differences and similarities in how foundations communicate their processes and priorities
- How to begin your initial approach and funding request to a Foundation

Part II: Developing, Cultivating and Maintaining Foundation Relationships: February 16 (3:30 to 4:30 PM EST)

- A more in-depth conversation on the Do's and Don'ts for building, cultivating and stewarding long-lasting relationships with Foundations.
- Strategies for getting the attention of foundations who may not be aware of your organization
- Maintaining an existing relationship your organization has with a Foundation.

Foundation **Overview.**



In 2010 over **\$290 Billion** was given to non-profits in the United States



Types of Foundations



Family Foundation

- Family members play a significant role in decision making
- Giving is aligned with values and interests of family



Corporate Foundation

- Geographic connection
- Aligned with corporate citizenship goals and values



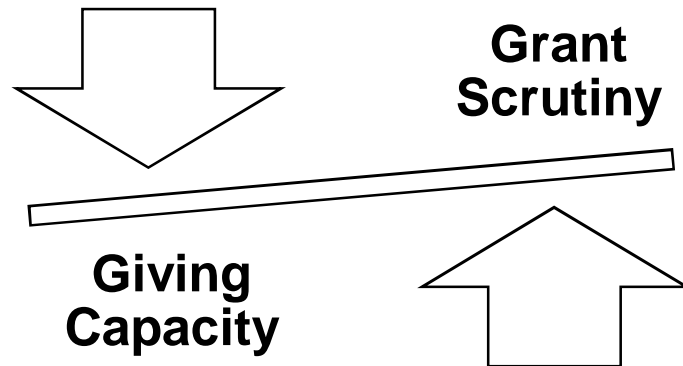
Community Foundation

- Supports organizations and programs in a specific geographic location
- Focus is on local and regional needs

Foundations

Current Trends in Foundations.

The Economy and Effect



The Economic Impact

Decrease in **Number of Grants** Awarded
Decrease in **Size of Grant** Amounts
Decrease in the **Number of New Grantees**
Decrease in the **Number of Multi-Year Grants**
Decrease in **Capital Grants**
Invitation only
Reassessment of priorities
Accountability emphasis

Foundation Center
2010 Foundation Growth and Giving Estimates
1,300 Foundation Respondents

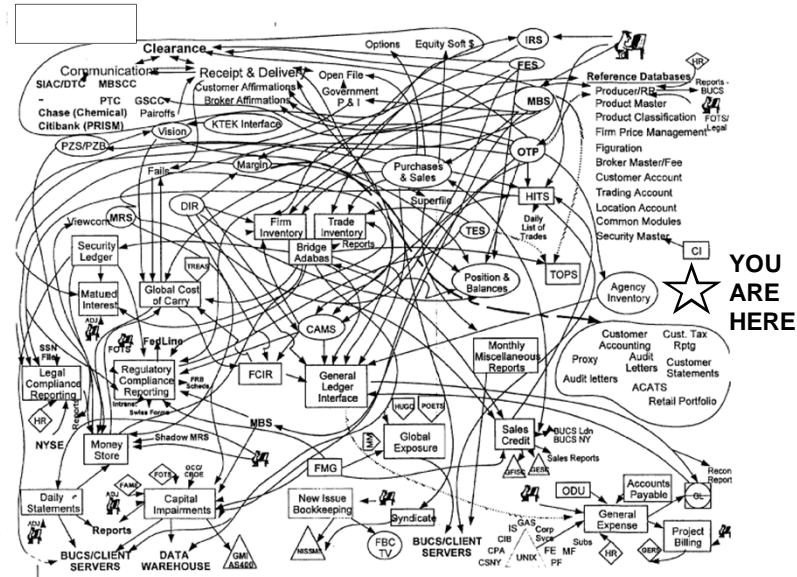
The Grantmaking Process.

Polling Question.....

How many years of grantwriting experience do you have?

- a. Not years, just months
- b. 1 - 5 years
- c. 6 -10 years
- a. 11+ years

Navigating the Foundation Maze



Funder compatibility.

What Foundations Look For
When Making an Investment.

The Right Fit.

Interest

**Geographic Area
Priority Focus
Population Served**

Type

**Direct Service Providers
Intermediaries
Advocacy**

Life Stage

New Growth Mature Turnaround

Identifying Foundations Finding the Right Match

Peer Research

- Senior Centers
- Community Centers
- Hospice
- Food Banks
- Hospitals

Foundation website

- IRS Form 990
- Grant Guidelines
- Annual reports
- Grantee lists or database

www.foundationcenter.org



Peer Research

Peer Research

- Senior Centers
- Community Centers
- Hospice
- Food Banks
- Hospitals

Websites

Annual Reports

Newsletters

Peer Fundraising Comparables

	HEC	Keep Indianapolis Beautiful	Indiana Wildlife Federation	Citizen Action Coalition	Central Indiana Land Trust	Indiana Recycling Coalition
International Facility		\$3000+				
IPL		\$3000+		x	x	x
Donor name	x		\$100-\$250			
Donor name		\$300-\$999	\$100-\$250		x	
Donor name			\$500+			
Donor name	x	x	\$100-\$250			
Donor name			\$100-\$250			
Donor name	x	\$300-\$999				
Donor name	x		\$251-\$500		x	
Donor name	x		\$500+			
Donor name			\$100-\$250			
Donor name	x	\$300-\$999				
Donor name		\$1,000		x		x
Donor name	x				x	\$100+
Donor name	x		\$100-\$250			\$100+
Donor name		x				
Donor name			\$100-\$250			
Donor name			\$100-\$250		x	
Donor name						\$100+
Katz, Sapper & Miller		\$3000+			x	x
Kenneth and Krizztina Inskeep		\$300-\$999	x			x
Donor name		\$300-\$999				
Kiwanis International	x	\$3000+		x		
Konrady Plastics, Inc.			\$251-\$500			
Donor name			\$500+			
Donor name	x		\$100-\$250			

Foundation 990's Tell a Story

Grant Amounts Grant Ranges Interests and Geography

Hoover Family Foundation

Themes

- Grant range \$1,000 - \$10,000
- Average \$5,000
- Children and youth
- Education, human services, arts
- Programs
- Portland and Indianapolis

990's are available for free at
foundationcenter.org

HOOPER FAMILY FOUNDATION FORM 990-PF, PART IV		GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR 2009 - 10				EIN 35-1873553
RECIPIENT & ADDRESS	Fed ID	RELA TIONSHIP	STATUS	PURPOSE	AMOUNT	
Midwest Academy 8001 Congressional Blvd Carmel, IN 46032	35 1890348	None	Charity	Educational software	\$1,000	
Information & Referral Network 3901 N. Meridian Street, Ste 300 Indianapolis, IN 46208	31 1216792	None	Charity	Increased specialist staffing	\$10,000	
Children's Healing Art Project 25 NW 23rd Place, Ste 6 Portland, OR 97210	61 1499793	None	Charity	Art program for hospitalized children	\$6,000	
Children's Relief Nursery 6425 Lombard Street Portland, OR 97203	93 1260988	None	Charity	Parenting Education project	\$8,000	
Friendly House 2017 NW Saver Portland, OR 97210	93 0524232	None	Charity	Mental healthart therapy for children in transitional housing program	\$5,200	
Happy Trails Riding Center 20500 Fernview Road West Linn, OR 97268	42 1703566	None	Charity	Staff support	\$5,000	
Neighborhood House 7780 SW Capitol Highway Portland, OR 97219	93 0386875	None	Charity	CASA/START program	\$8,000	
Northwest Children's Theater 1810 NW Everett St, Ste 216 Portland, OR 97224-1234	93 1111344	None	Charity	Theater arts program in schools	\$5,000	
Northwest Professional Dance P O 42488 Portland, OR 97242	20 2012406	None	Charity	Dance Moves program	\$5,000	
Piano Santa Foundation P O 80214 Portland, OR 97280	93 1207664	None	Charity	Improve Music Library	\$1,000	
Play Write 4924 NE Multnomah Portland, OR 97213	20 0414784	None	Charity	Playwriting intensives to at-risk youth	\$5,000	
Portland Community Land Trust 3109-B NE Broadway Portland, OR 97232	93 1290320	None	Charity	Latino outreach to education program	\$5,500	
Portland Opportunities Ind Ctr 717 N Klingsworth Court Portland, OR 97217	93 0593858	None	Charity	Transitions Program at Rosemary Anderson Highschool	\$8,000	
Portland Talo 3230 NE Columbia Blvd	93 1309882	None	Charity	Teaching and Reaching through Talo	\$5,000	

Grant Research Resource



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Individuals Like You With
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How can we help?
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**The Foundation
Directory Online is
available free of
charge at over 450
locations throughout
the United States**

The Foundation Center provides free funding information through networks of more than 450 "outposting offices" - libraries, university foundations, and other nonprofit resource centers located around the U.S. and around the world. Use the map to find a participating location near you. [Find Out More](#)

GET STARTED

New Course! Proposal Writers Boot Camp

Learn to craft a comprehensive and compelling proposal package in this intensive three-day course.

March 12-14
Pasadena, CA

May 8-10
Boston, MA

Register now >

FIND FUNDERS

Foundation Finder

Name:

State:

ZIP Code:

Match

More search options >
Get the widget >

**FOUNDATION
DIRECTORY
ONLINE**
Start Searching >

GAIN KNOWLEDGE

New Report: Key Facts on Family Foundations

According to the new edition of *Key Facts on Family Foundations*, the 1.1 percent increase in family foundation giving between 2009 and 2010 marks a reversal of the previous year's 3.4 percent decline.

Download the report >

What's New | **Headlines** | **Events**

Advice on First Approach to a Foundation

More new videos at GrantSpace >



Research Homework

Interest areas and priorities

Geographic area served

Population served

Award ranges

Operating , program, capital support



**Seniors
Health
Vulnerable
Populations
Food
Quality of Life
Civic Engagement
Nutrition
Self sufficiency
Hunger
Independence**

Polling Question.....

What has been your experience working with foundations?

- a. Great! No complaints.
- b. Frustrating
- c. So-So
- d. I'm so new at this I don't have an opinion

Approaching a Foundation.

The Challenge

**Helping a Foundation Understand the
Purpose of Your Organization and the Need
for Its Existence**

Working with Foundations Takes Time



Introduction

**Paperwork
submission**

Review

Decision

Follow-up

Glossary of Terms: Understanding Foundation Speak

Information Request

- Letter of Inquiry (LOI)
- Application
- RFP
- Proposal
- Common Grant Application Form
- Supporting documentation
- Meeting

Submission Process Invitation only

2 part submission process

Online application

Paper submission

HELLO
my name is

Meals on Wheels

What do I say?

"My name is Joanna Nixon and I'm calling on behalf of Meals on Wheels of Jackson County.

I have reviewed your grantmaking guidelines and see your foundation has an interest in **nutrition, seniors and self-sufficiency.**

Our mission is to x and we provide 2 meals a day to over 75 low-income seniors a week in rural Jackson County. I think our x program might be of interest to the foundation, **I was wondering if I could schedule a time to meet** with you and tell you more about the impact we are making in the lives of low-income seniors."

Frequently Asked Questions

Organization Questions



When were you **established**?

What problem or issue are you trying to **solve**?

How are you **different** than....?

How many individuals do you **serve**?

Tell me about your **leadership**. (staff and board)

How are you **supported**? (how and who)

What is your current **financial situation**?

What are you most proud of in the past **12 months**?

What are you most **challenged** by?

What are your organization's **greatest needs and priorities**?

Frequently Asked Questions



Program Focused Questions

Who do you **serve**?

Tell me about your **program**.

Tell me about the individuals that implement your programs.

How has your program **changed** to respond to the economic times?

Tell me about your **community partners**.

How do you define and measure **success**?

Meals on Wheels At A Glance

Established in **1990**

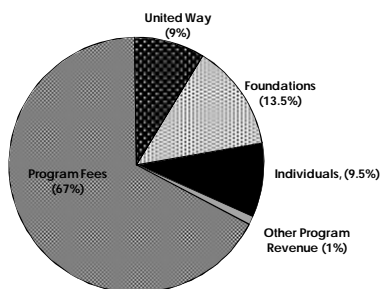
4 Full-time staff **2** part-time staff

1,500+ seniors served each year

7 Pennsylvania counties served

\$500,000 annual budget

Revenue Sources



Board of Directors

Board member name
Affiliation

Board member name
Affiliation

Board member name
Affiliation

Board member name
Affiliation

Board member name
Affiliation

Board member name
Affiliation

Partners

Jackson County Hospital

Jackson Senior Center

Riverview Hospital

Tri-County Community Center

Alexander Mental Health

Meals on Wheels of Jackson County

25 S. Illinois Ave.

Alexandra, PA 69870

(xxx) xxx-xxxx

www.mealsonwheelsjackson.org

Executive Director: Sarah Cook



Meals on Wheels Overview



What We Do

Home Delivered Meals: 2 meals per day seven days a week

Nutrition Counseling

Social Work assessments and referrals

Intensive Case Management for over 300 clients per year

Preventative Home Safety Services including grab bars, railings and smoke detectors

Who We Serve

59% are age 75+

96% are low-income

79% have dietary restrictions

67% live alone

37% have a disability



2010 By the Numbers

375

Volunteers

12,000

Meals
Delivered

1,800

Home Bound
Seniors
Served

7,800+ Seniors served since 1990

Meeting tips

A foundation is looking to **build knowledge** of your organization, **see evidence of the strength of your program** and **meet the leadership** of your organization

- 1 Find out in advance what a foundation staff person wants to see or learn**
- 2 Differentiate your organization**
- 3 Involve your Board, a volunteer or program participants**
- 4 Ask Advice**



Grant Writing Tips

- 1** Submit the request that was discussed and for the amount provided
- 2** Meet Deadlines
- 3** Follow instructions (page limits, presentation)
- 4** Review for typos and make sure budgets add up correctly
- 5** Be honest and accurate about partnerships, supporters and costs

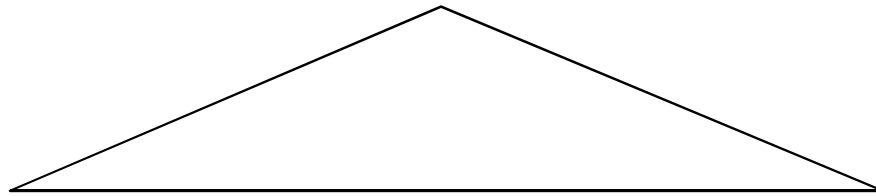
Conclusion

- 1.** Spending time and energy researching a grant fit is more efficient than randomly submitting requests.
- 2.** Don't chase dollars. A relationship with a foundation should be a good match for you and the foundation.
- 3.** Spend time thinking about the frequently asked questions. Could you answer most of the questions in a written grant proposal or in a conversation with foundation?
- 4.** Be clear on needs and priorities and how to communicate them.

Participant Takeaways

1 What was one thing you learned that you didn't know before attending the session?

2 What will you do differently as a result of participating in today's session?



Questions?

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Part II of this Webinar

*Developing, Cultivating and Maintaining Foundation
Relationships*

will be offered on

Thursday, February 16 at 3:30 p.m. EST