



Grants: Who, What, When & Where

and a little about how

Don't *Apply* Without

- Nonprofit status documentation 501(c)(3) or other
- Articles of Incorporation (you need to be a legal entity)
- Board of Directors list (with affiliations and contact info)
- Audited financial statements with a 990 (if you don't have this, a statement as to why and last year's financials)
- Program budget (if you are applying for program support)
- A mission statement
- Current operating budget
- Plan to track grant spending:
 - Who is spending the funds and will be accounting for spending?
 - How will spending be recorded?
 - You may have to submit receipts or prove services provided

Tips & Tricks

- Use a spreadsheet to calendar grants, track foundation interactions and information, and keep notes in one place
- Reach out to foundation staff or trustees if possible before submitting
- Start with the budget
- Don't use jargon or acronyms like PATH, Intl., CTRI or ESMHL
- Read all of the instructions and do what they ask (page limits, certain documentation, number of copies, etc.)
- Be early
- Save everything
- Ask for feedback when you get the grant and when you don't (what could be better or what stood out?)
- Don't be discouraged by Nos – Reapply next year if they didn't tell you that you don't fit their funding priorities
- Check in with program or property staff on projects and due dates throughout the year
- TURN IN REPORTS and follow up if they don't ask for one; send a quick story or photo with a thank you
- Foundations talk to one another, be respectful

Free Tools

Grant Station

- Free benefit if your center is a PATH, Intl. member
- Email centermembership@pathintl.org for login info
- There are how-to videos and tutorials on the site

GuideStar

- Gives you a limited number of free searches on foundations/nonprofits monthly (by name)
- Will have 990s for many foundations
- "Claim" your nonprofit and provide information to get gold, silver or bronze seals (donors like this)

IRS 990 Search Tool

- apps.irs.gov/app/eos/allSearch
- You can find 990s for any foundation here

Foundation Center

- Free for United Way agencies and at many public libraries
- Similar to Grant Station

Canva

- Easy to use online graphic design software
- Has free options for everyone and you can upload your own photos and logo to include
- As a nonprofit, you can apply for a free upgraded account for more options
- Use these in grant reports and proposals that are not online

Paid Tools We Like

GrantWatch

- Paid foundation search tool
- You can subscribe for one month at a time
- You can print/save foundation info and research further later
- This is just one of many foundation search options, we like it for the subscription flexibility and level of information given on funders

Association of Fundraising Professionals (AFP)

- Join as a member or attend a local chapter meeting for education sessions
- <https://afpglobal.org/chapters>

Grant Professional Association (GPA)

- Join as a member or attend local chapter meetings for education sessions
- Find consultants for writing grants or locating the right foundations for your organization
- <https://grantprofessionals.org/page/chapters>

Rice University Glasscock School

- Offers webinars/online classes on grants, fundraising and nonprofit management
- Glasscock.rice.edu

990 Items to Look For

- Grant Officer or other contact person and contact information
- Instructions on how to apply
- List of staff
- List of Trustees/Board Members
- List of last year's gifts, their amount and the type of gift (program, operating or general, or capital)

Always Remember Your Why!

Notes



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