

**Nonprofit 911 – December 15, 2009**  
**6 Steps to Building a Dynamic Grantseeking Calendar**  
with Cynthia Adams of GrantStation  
Sponsored by Network for Good

The MP3 audio transcript can be found at  
[www.fundraising123.org](http://www.fundraising123.org) or [www.nonprofit911.org](http://www.nonprofit911.org)

**Rebecca Higman:** So, now I am really excited to introduce our speaker. Cindy Adams has been a fundraiser for more than 35 years. So we all know she knows what she is talking about. Working directly for nonprofits and as a fundraising consultant, Cindy specializes in building bridges between funders and grantseekers. She strongly believes that successful grantseeking requires a thorough understanding of the funders, as well as sound knowledge of the playing field. Her life's work has been to level that playing field, creating an opportunity for all nonprofit organizations to access the wealth of grant opportunities throughout the world.

So without further ado, I am really happy to turn the floor over to Cindy to get us started.

**Cynthia Adams:** Thank you very much Rebecca. Welcome everyone. I am so glad to be on this call with Network for Good again. I have done this several times now, and every time we have a great turnout and it is always lots of fun. Be sure and send in your questions if you have questions during the presentation, and I am sure Rebecca will break in and ask me the questions if need be.

So, at the nonprofit911.org website, you can click on the slides and follow along if you want to, but you don't have to. You will all receive notes afterwards as Rebecca said, so you can get the information that we share today in that format as well.

The other place you can access the information we are going to talk about today right now is on the GrantStation website: [www.grantstation.com](http://www.grantstation.com). We have a series of articles running called "Building 2010 Grants Calendar." So you can click over to Grants Station and take a look at that at some point, as well.

Now you are getting the scoop, because we are only in the second part of that series of those articles. There are five articles, but I am going to give you the summary of all five articles today, so you are going to be way ahead of the other folks that are reading the series on GrantStation.

So again, welcome. Today, we are going to be talking about how to build a 2010 grants calendar. We are going to be talking about the importance of adopting a process. The process is super simple. I will give you an outline of that process in just a minute. We are going to talk about how to design and adopt a grant decision matrix. And again, it is very, very easy. Right now there are samples on the GrantStation website, as well as samples in the slides that you are receiving, or that you can look at on the Nonprofit 911 website.

So we are going to be talking about a grant decision matrix. We are going to talk about developing project descriptions and creating project descriptions and being selective and strategic in these project descriptions, and then simplifying the grants research so that you are really identifying the most appropriate grant maker for any given program or project, including general operating money. And then taking all of that, everything we have talked about so far to that point, and then creating a strategy- sorting, and analyzing, and categorizing what you have found, and really creating a grant strategy so you can establish a solid grant seeking calendar for 2010.

And usually, I like to work 12-18 months out. So when I say establish a calendar for 2010, I am really talking 2010 and into 2011. So that is what we are going to be covering today. And I would like to start by talking about the process. Right now, if you are on slide 2 of the PowerPoint, that is great. You can just stay there for a second. And let's discuss the process before we get too much farther into this.

Let's see. What is a good way to put this? Too often, we identify a grant maker that might support a particular project just because a staff member walked in our door and says, "Can you find me funding for this project?" Or, we draft a grant request because a board member brings us a copy of a new federal or state RFP, Request for Proposal, that is on the street and says, "I really think we can get this money." And so, you dive into writing a proposal or looking for a grant maker, really just sort of on the fly. And too seldom do we really actually build a calendar that is thoughtful and has a strategic approach to what we are trying to achieve.

And if there is one thing I have learned over the many years I have been grant writing and grantseeking, it is the importance of building that strategy before I dive into writing the first proposal.

Today, let's really focus on establishing this grantseeking calendar, what needs to be incorporated into it, and how you make decisions on the projects and programs that go into that calendar, and which ones you have to say no to, which grant makers should go into that calendar, and which ones you have to say no to so that you are really crafting a calendar for the next 12-18 months that is truly going to fit the needs of your organization and allow you to be writing proposals that are the most effective and most efficient, because you have such limited time. I mean we all do, right? So you really want to make sure you are only writing proposals that you have a fairly good chance of having awarded.

So the first step of developing a grantseeking calendar is really to identify the projects that need funding in the next 6-18 months or so. And be sure that you review your general operating budget as well, especially for 2010, and maybe even project a little bit into 2011, just to see if you might want to include grantseeking for funds to supplement your general operating budget, because you may have to rely on some grant funding in the next year or two just because of the economy, the way it is. So think about that a little bit as you move forward.

As you sort of sort through these projects, the way I have always done it, let's say you are a very small organization like The Matthew House. I am not saying you are small, but you know that you are a compact organization. You probably run on a pretty tight budget. You know where the money is going to go. You know pretty much where the money is going to come from. But how do you figure out which projects and programs are going to need money in the next six, to 12, to 18 months?

Well, the best way to do that is to survey; to sit down and talk with your board and your staff, and perhaps the people you serve and really determine what are those things that are going to need bolstering, that are going to need funding in the next couple of years.

And it is pretty easy when people start telling you things like, "Oh, we are going to need to upgrade the computers. We are going to need to get some printers. We are going to be putting out two new staffs. We are going to need office equipment for that." When you start hearing all those different things that are capital purchases, you start thinking in terms of, "Maybe we should do a mini-capital campaign." And maybe it is just a grant capital campaign, which is one way of doing a capital campaign.

And so as you hear and gather information and determine what projects you are going to need funding for, you will be able to sort of sort through them and say, "OK. These can all go into one category and these can go into another category." You should also be able to sort of pick off those things that really won't work at this time. You know, "We are not going to be able to launch that new housing project that we wanted to launch. We are going to have to put that on the back burner and maybe just look for the planning funds at this point, or a donation of land at this point."

So you really want to identify the most needed funding for the next six, 12, 18 months. And then the next step is to really complete a two page project worksheet, which we will go through in just a minute, for each program that requires grant support. For each one of these, the capital projects, the general operating...Let's say you have a workforce development project that you are trying to fund. That would be another funding project description. So you are going to do a project worksheet for each one of these projects. And again, we will talk about that in just a minute.

And these worksheets will facilitate the tasks of really identifying the potential grant makers, which is a real manageable process using a searchable database like GrantStation, or if you have access to GuideStar or the Foundation Center, Grants.gov; you know, those different areas that you can go to and do your grants research.

At GrantStation, we give you all the federal, the state, and the private funding sources, so you can do all the research in one area. So you can mix and match, as well, and put together a foundation center with GuideStar, with grants.gov. So there are many different ways of doing that.

And after you have come up with a list of possible grant makers, and we will talk more about that in a minute, too, then it is time to draft an overall funding strategy for each

project, and then each of these specific project strategies will feed into the longer term grantseeking calendar. So that is sort of the process that we are going to go through and that I want to teach you.

And like I said, I prefer to establish an 18 month calendar, but you can set whatever timeline feels workable for you and for your organization. And if you keep updated copies of each project worksheet that you develop, and I like to keep them in like a hard copy three ringer binder, then you can use it for quick reference when you are talking with staff or with board and you need to, "Oh, we got six computers donated, so let's take that line item out of that project description.", or, "We need six new computers we didn't know we would need, and so let's add that to that project description." But it is really great if you have the three ring binder, because you can bring it with you to board meetings and you don't even have to give a report. You could just sort of pass it around and people will be able to see where you're at with each project, which funders you have identified for each project, what the calendar is for each project, and then the overall calendar. And again, we will talk about all this more in just a second.

But that is basically the process. It is really a matter of identifying the most appropriate programs that need funding, creating project descriptions worksheets, doing the funding research, creating a strategy for each one of those grants or each one of those projects, and then tracking that information and keeping it an overall calendar.

If you are following along on the PowerPoint, you can click on PowerPoint slide three now if you want. Let's just step aside for a minute and talk a minute about the RFP decision matrix. This is a tool that you should develop. And if you get nothing else out of this workshop today, if you go forward and develop an RFP decision matrix, you will be very happy.

I usually build two matrices- one for government funding and one for private funding, like foundations and corporations. And this matrix is used to really determine whether I am going to apply for any given grant. So if someone comes into my office and says, "I have this request for proposal from the state. I am in Alabama. It is from the state of Alabama Department of Health and Human Services. Boy, it sure looks like we should apply for this. It looks like the perfect funding for us," then you can take this matrix you have developed and really lay it over the proposal and determine whether you should go after this and apply for this money or not.

And the components of a matrix really include a set of criteria that you will develop, and it is just a set of decision criteria, like timing-do we have enough time to apply for this proposal? Credibility-do we have credibility with the organization that we are applying to? Do they know who we are, or is this going to be a brand new application where they have never seen our organization before? Is there any kind of relationship established there or not? Does this proposal require a lot of pre-proposal work? Do we have to have partnerships in place, or do we need to have matching money in place before we go forward? That kind of thing.

So you will be developing a set of decision criteria. And this is the article that we have posted on the GrantStation website homepage right now, so you can go to the GrantStation website and go to the “Tracks to Success” Series and read and see all about this matrix-how to develop it. We have a sample there, a couple of keys so you will understand how to put it together. But the matrix is really composed of the decision criteria, a set of weights, because you are going to assign a weight to each criterion so you can really add it up and see what your score is. And then you will be able to really determine whether a grant proposal that is on the street is something that you might want to apply to.

So like I said, we have this up on the GS homepage right now. It is just a step by step how to develop this matrix. So you can download that and get samples right there. But remember, this is only a tool to help you figure out a “go” or a “no go” decision on any given grant opportunity.

If you are using the PowerPoint, go ahead and go to slide 4, which is an example of a decision matrix with the weights, the credibility, the scores, the criteria, and all those things on it. You can take a peek at it. But again, remember this is just a tool, but it can be helpful, particularly if you get a fair number of people suggesting you apply for this money or that money all the time.

And if this criteria that you develop is developed in concert with your fundraising committee and approved by your fundraising committee, it holds a lot more weight, so that if the president of the board comes to you and says, “We should apply for this federal money” and you run in through the matrix, and you come up with a big fat, “No, this isn’t going to work for us,” then you will have something to fall back on. Just say, “The fundraising committee has come up with these criteria and we don’t meet it, so we have to set this aside.”

Because really, fundraising is about knowing when to say no as much as it is about knowing when to ask for the money. You should only be asking for the money when you are 50% sure or more that you are going to get it. That is how you become a successful fundraiser, just sort of knowing that when you ask for the money, you have a very good chance of getting it. And this matrix will help you sort through the different opportunities that come down the pike so that you can really walk away from those opportunities that aren’t going to pay off and jump on those opportunities that look as if they will pay off.

So let’s go ahead and go to the PowerPoint #5. It should say “Project Description” on it. So you sort of understand the process. We have talked about the RFP decision matrix, which we have just gone through with the criteria, the scoring, and all of that, and you have created that tool. And you can just do that in Excel, by the way, or I think Google Docs has a spreadsheet you could use, as well. So it doesn’t have to be anything fancy. This matrix could be fairly easily put together.

But let’s set that tool aside for a minute and go back to this idea that you have talked with your staff, you have talked with your board, you have talked with your volunteers, you

have talked with some of the patrons or the people that you serve and you have come up with four or five projects that are going to need funding in the next 12-18 months. You are going to have a short fall in general operating, so you are going to do a project description worksheet on that. You have a project. Let's use the one that I have on the slide, which is a watchable wildlife area. You had land donated, so you are going to open up or try to open up a watchable wildlife area and create trails, have a facility at the trailhead, etc, etc. So that project is on your table.

And then let's say you have two or three other projects as well. One may be a small little capital campaign to raise \$20,000 to replace all of your computers, and your printers, and some office equipment. So you have these different projects that you have identified, and you are going to create a project description worksheet for each one of these. And the worksheet will have...it is pretty short. And next week or the week after we will be publishing the template on the GrantStation website, so you can download it if you want to download the template at that point as part of this Tracks to Success series that we are running.

But you can use this project description worksheet to really guide your grant research and developing a grant strategy for each of the projects that we talked about. So for example, the watchable wildlife area. You want to identify who the lead staff person is. You want to write up a short description. And it doesn't have to be fancy; remember that. What you are going to be using this worksheet for is really...it is an in-house tool. It is a two page worksheet. It is really just a guide for you funding research for each project. You want to take some time to develop the worksheets, because you want to have the right information in it, but it doesn't have to be beautifully written. Although, it is pretty easy to take this information and turn it into a letter of inquiry. So it does serve as sort of a foundation for developing the letter of inquiry for the next stage of writing your grant proposals.

But in truth, right now, you just want to get the information down. You really just want to tell: What is the project? What is the need for the project? And if there are any relationships to past projects, you want to mention that.

So in this case, when we are talking about a watchable wildlife area, we are saying in the project description that we have 310 acres adjacent to a county park which was donated to us in 2008. The acreage is rich in wildlife, including several bald eagle nests and the hot springs that attract numerous animals, blah, blah, blah. And then we talk about the need. Then we talk about the tri-county area population of 87,000 covering several thousand acres; it only offers one other set of public trails that are universally accessible, which means that anyone with any kind of disability can't access any other trails. So the demographics are indicating that you may want to have a watchable wildlife area that is universally accessible. Any relationships to past projects; you know, this is the second watchable wildlife area that we have built or developed in the last five years or whatever it is.

If you are watching this on the slides, you can go to slide 6. Then, you want to do a summary of the budget for this project. And really, at this point, again, more of an estimate. It really doesn't have to be solid numbers, although you may want to make a few phone calls and just make sure you are in the right ballpark. So you know, planning, money, parking area, trailhead facilities, maybe an interactive kiosk, some signage, educational material, maybe a maintenance contract for the watchable wildlife area, for the trails, and for the parking lot. So you are coming up with sort of a general budget of what this project is going to cost over the next year or two or three years.

If you are watching the slides, you can go to slide 7. Each one of these projects, writing up the description is...I mean it takes a little time, because you want to get it right. You want to really describe the project as you see it unfolding. But you don't want to put a lot of detail in it. This is going to be used for doing funding research and putting it in that three ring binder so that you can share with your board what you are up to these days. But it doesn't have to be perfectly written. It really just has to be a pretty good description.

If you are looking at the slides, you want to be on slide 7. The key, however, to this whole project description worksheet is identifying. At the very, very bottom of the project description worksheet, you are going to identify the key words that you are going to use to do your research. And don't get lazy here. This is not the time to say, "Oh, I don't need to do that. I know what this is. It is a watchable wildlife area, so I need parking...I know what it is." Don't do that. Take 10 minutes, take a half an hour, sit down and really think through the key words for this project that you are trying to raise money or, even if it is general operating. So you just want to make sure that you are uncovering the most important keywords.

And you are going to be answering questions like, "What is the geographic focus of this project if there is any? What areas of interest are we covering?" So, for example, with the watchable wildlife area, we are talking about environmental education. That is definitely a keyword. Trails-that is a keyword. Physical fitness is a keyword. Hmm. Physical fitness. Right. That sort of leads us into this idea of obesity prevention, which has been tossed around for several years now and has become a keyword in research when you are doing grants research.

Look at what type of support you might need for the project. For this project, we need project planning. We are going to need infrastructure support, ingress, egress, parking. We are going to need facilities, at least trailhead facilities. Technical-we need to purchase a kiosk. We need to program the kiosk. We need project support just for ongoing support of the project itself. Another keyword might be outdoor safety. Maintenance is another keyword.

So just be sure you really think through the keywords. And truthfully, I find that getting just a small group of people in a room...it doesn't have to be the whole staff. If you are not heavily staffed and it is just you and a few other people that are really running the organization, mainly, it is volunteers, fine. Get in a room, sit down, read through the

project description, and come up with keywords, because really, just having more brains think through the keyword part of it can be incredibly helpful.

When I was doing this example, I went out and I yelled at the staff, and I said, “Hey you guys, help me think through some keywords for this.” I mean I do this all the time. You would think I can think of the keywords. But it was one of our researchers that said physical fitness. And then she said, “You know, obesity prevention is really a way to do funding research these days. It is a term that is being used a lot with private grant makers in the area of health.” And I thought, “Huh. I wouldn’t have thought of that.” I really wouldn’t have. I was really much more on this track of watchable wildlife. I was even going down through climate change, how does that fit in? You know, that kind of track, before she pulled me back and made me realize what the day to day use of this area would be. So I think it is critical that you get some other heads in the room and really think through the keywords before you do your funding research.

If you are looking at the PowerPoint, you can go to slide number 8. The next, the next thing you want to do once you have developed your project description worksheets with the keywords is you really want to dive into your grants research.

Now, you know, I am a big fan of GrantStation, because I designed it! So it is easy for me to use, and I like it because it has access to all the federal and all the state agency funds, as well as the sort of “quasi” state agency funds like housing alliances, and humanities forum, and art council, and then, of course, all the private funders, foundations, corporations, and religious grant makers, associations that have grant making programs, like the National Association of Realtors-that kind of thing, Home Depot-all of those things. GrantStation is really an active database of grant makers that you can tap into. And we only profile grant makers that are actively accepting requests from a variety of nonprofits, so you are not going to hit a lot of dead ends when you are doing research on GrantStation.

But again, you could also use Foundation Center, GuideStar. There are other tools, grants.gov if you are doing federal research. What you want to do next is take those project description worksheets, decide on a tool you are going to use to do the research, and start really delving into the research by looking at federal and state money, followed by private money.

Now, you want to do your government research up front, because it accomplishes two things. And don’t just set it aside and say, “Oh, the government will never fund this.” Even if you know there won’t be any government and state funding available to you at this time, take the time to at least review the federal and the state opportunities. And there are two reasons for doing this.

One, if you do find something...let’s just say, by chance, there is a program that has just been announced and it actually works. If you do find something, then it is sort of one stop shopping. In other words, it should be a large enough grant award to cover most, if not

all, of the project costs, although, of course, some government grants require matching funds, and you might have to look for that, as well.

But this one stop shopping idea is always attractive if you can find it. But two, and this is the most important piece, if you can't identify any government funding, then when you apply to a private grant maker, which you will, because there is not going to be any government money for this, you can add a statement such as, "After researching potential government funding sources, we have determined that, at this time, there are no government programs that will support this project."

This statement underscores the importance of the role that the private grant makers play in this project, and it doesn't give the grant maker the out of saying...Because imagine this. You have 12 people sitting in a boardroom around a table. They are reviewing grant proposals. They have 200 requests and they can make 20 awards. And they have narrowed it down to 40 requests, and yours is one of them. And someone picks up your proposal and says, "I think this is a great proposal. These folks really seem to have their act together. We don't really know them that well, but the only problem I have with this is I am pretty sure that," and I am going to pick on you again, the people at Matthew's House, "but I am pretty sure that that housing money is available federally. I am pretty sure I have heard about stimulus money. I think they could get some money that way. Let's set this one aside and have them check that out first, and then they can always come back and apply later."

You don't want to give them that excuse. Do not let that happen to you, because it happens a lot. And you just want to make sure that you have let them know that you have done your homework, and at this time, there aren't any government programs that will support this project. So that statement becomes very important.

So, either one stop shopping, or you could tell them that there aren't any federal or state funds that will fund this right now. And then you drill down. Let's say you have found no federal sources, but a couple of state sources that might work, so you make some phone calls, and this one does, but this one doesn't. You sort of kind of go back and forth and you find sort of a quasi federal/state agency that might fund some of the planning or give you some technical assistance, so you put them into your proposal, and you just keep drilling down.

And you want to do your government research first. Always do local government research. Most of you know what the municipal, county, or the borough government has available, but be sure to check that first. Then do state and federal. And then you can get into the private funding research.

And after you have done your local research and your government research/state-end loans, then you really do want to dive into those US charitable giving grant makers. And you can use the advanced search on GrantStation to do that fairly quickly. But if you are not a member of GrantStation, then you can also use Foundation Center or GuideStar,

and just drill down, drill down, drill down and just be really selective. If a grant maker doesn't look like it is going to fit what you are doing, set them aside for now.

If you have questions at this stage, where you are just looking at their profile on GuideStar or on GrantStation, and they aren't looking good to you, then they are probably not the best fit. And so, don't throw them away. Just set them aside and think of them as tier 2 or tier 3 potential funders. And really try to target the list that you come up with, and come up with a list of grant makers that will really consider the proposal that you are going to put in front of them.

On GrantStation, we have a step by step tutorial on how to do this research using the GrantStation website. But basically, you are drilling down. You are reviewing background materials. Let's say you find a grant maker. I am just going to make one up. Let's say the Hasbro Children's Trust, I think it is called, or Hasbro Children's Fund. So you would look at their profile on GrantStation, then you would look at their website. It is looking interesting; maybe they might work out, so you ask for a copy of their latest annual report, or maybe they have it published, posted as a PDF on their website. So read through that, and again, you are going to start eliminating things. "That doesn't quite fit my proposed project, or it seems like they are really funding after-school programs, and this isn't an after-school program." So you just have to really play devil's advocate with yourself. This is a great job for a board member, the board member, or the fundraising committee member that is always the naysayer. This is a perfect job for them. Let them take these project descriptions and do the funding research, because believe me. They will only come back with one or two potential grant makers, and they are probably right. You really want them to drill down, drill down, drill down.

Eventually, you are going to create a brief description of your project, and you probably can pull that right off of the project description worksheet that you have. And you are going to compile a set of questions for each grant maker. And it may just be two or three questions. It may be something like, "Do you require matching funds? And can those matching funds be committed verbally ahead of time or do we have to have the money in hand?" You know, that kind of question.

You want to make sure that the questions that you compile are questions that can't possibly be answered by doing your homework. So, not on our profile on GrantStation, not on their website, not in their annual report, perhaps not even in their IRS 990, which should be posted on GuideStar. You really want to have done all of your research and come up with a very specific set of questions. You will then call or email the prospective grant maker. You are going to use that brief description of your project, and you should create a two or three line sentence that describes your organization as well. You are going to really use it as a script when you are talking to them. And you are going to ask them specific questions.

When you get on the telephone with a grant maker, be sure to keep it short, and let them know how much time you need. You want to say, "Hi. I have read through your website. I have looked at your 2007 and 2008 annual report. I have reviewed your IRS 990. I think

our project and your goals really mesh, but I have a couple of very specific questions. I need about 10 minutes of your time to ask.” And they will more than likely take your questions. And really, just ask those one or two questions and get off the phone, even if you only got one of the questions answered. If the 10 minutes is up, get off the phone. And always say at the end, “Listen, I asked for 10 minutes. I have taken 10 minutes of your time. I really, really appreciate it. Let me digest what you have told me. If I have any other questions, may I call back?” They will say yes because you have been so thoughtful and respectful. And this is sort of that first step in building a relationship with a grant maker, as well.

And then, when you call back, do the same thing. “I have one question. I think it will take about five minutes.” And then stick with it. Always stick with the time. I get teased all the time. Grant makers will talk to me and they will say, “You must have done another workshop, because I had a bunch of calls and people were telling me how much time they were going to spend on the phone.” And it is true. I know I do that, but it is good. You really do get through. I even get through to grant makers that may be going into a meeting. You know, “I have a meeting in five minutes.” They get a call from me and I say, “I have one quick question. It takes about three minutes.” They say, “Shoot.” I ask, they tell me, I am off.

You want that kind of relationship with a grant maker. You want them to know you respect their time, and then, in turn, they respect yours. And so it is a very quid pro quo relationship.

So you are going to call or email the prospective grant maker. You are going to complete a final review. And then, you are going to take all that information and you are going to develop a grant strategy.

Now remember, you have been doing research on each project description worksheet. And I just want to give you one little piece of advice about that. Stay focused when you are doing that. The trick to everything I am telling you today is to stay focused. If you are working on trying to develop a grant strategy around raising extra money for your general operating budget, then finish developing that strategy and identifying those grant makers before you move on to the next project.

So the trick is to stay focused, researching only one project at a time. Really, a disciplined approach like that will help you complete this task so much faster. You will be so glad you did it that way. And you will also find, and you know this already, I know some of you are thinking it, that sometimes, you will find a grant maker that you think, “Oh, I am going to put this grant maker in this strategy, but I have also got them in my general operating strategy and in my watchable wildlife strategy. I have got the local Community Foundation, or whatever, penciled into all these different places.” Pretty soon here, you are going to get rid of that. You are going to sit down and really figure out which one of these they fit into the best. But right now, leave them in.

And you are probably going to have, my guess is, anywhere between three and eight or 10 funders for a potential project, depending on the size. If it is a \$10,000 project, you may just have one or two. If it is a \$200,000, or a \$500,000 project, or \$1 million project, you may have seven or eight, or you may have one federal funder and two or three private funders. So they are all going to look different; each one of these is going to look different. That is why you have to build a strategy around each one.

If you are watching the PowerPoint, go to slide 9. This is just an example of a grant strategy. The key to building the grant strategy is to look at...After you have narrowed the field to the best possible set of grant makers for your project and you have collected background information on each grant maker, and you have probably talked to the grant makers at this point, and you have little notes scribbled on the side of each one, then what you want to do is really build a grant strategy around each project. At least for me, the key is to take the profiles of the grant makers that I have that I am considering and I like to actually put hard copies of them on a table. And I do it like a puzzle. I put it together. So I say, "OK. All right. Let's look at the deadlines first. Who do I have to apply to right away? What deadlines are out there? What are solid deadlines that I have to consider in my strategy?" And I will write those down, maybe in a big red magic marker on the top of each one what the deadline date is, and maybe how much money I can get from them. And then, I start building the strategy.

Now, for example, with this watchable wildlife area that we have been talking about, one of the grant makers we have covered was the National Park Service River Trails and Conservation program. They don't give money, but they give technical assistance. What they do is they will plan on a watchable wildlife area for you, and you need planning. So you need either planning money or you need someone to do it for you.

You find out that the National Park Service River Trails and Conservation program, that their assistance program will actually do the planning for you. And you have talked to them, and they are interested, and it is really just a matter of getting in the queue for them. And they tell you that, yeah, you fit all their criteria, and if you get your application in before the end of the year, it appears they could have you in the queue and the planning process started by February or whatever it is.

So you could put that into your strategy as sort of the first step. And it is really just a matter of forms you have to fill out, let's say. And then, the next part of the strategy might be: "All right. I have got my plans. The National Park Service is going to help me put together this plan. It is going to be a beautiful little plan which I can then use to start a proposal for getting the seed money to get this project off the ground."

The first place to go to for Seed Money, always, is local. So I am going to go to the bank where I bank, because I am going to run all this money for this project that I am raising, and ongoing maintenance, I am going to run through our accounts at the bank. And the bank is...I am just looking out the window here. I am in Seattle today! And the bank is the First National Bank of Washington.

So I am going to go over to the First National Bank of...Oh, this is Arkansas. So I am going to go over to the First National Bank of Arkansas and I am going to try to get \$2,000 to \$5,000 in seed money from them. And I have done my research, and they review proposals quarterly, and it looks like I can ask them for about \$4,500; that would be a pretty average amount to get from them.

So I am going to put them into my strategy right under The National Parks Service. And then, are there any other local fundings? Well, yeah. There is one funding source, Arkansas Power and Light. They are interested in this kind of project. They can get their name on it and they will like that; there will be a lot of traffic there. So I am going to ask them also for \$4,500.

So I am looking at the National Park Service developing the plan, and there is a value on that, and I need to find out what that is. And then the First National Bank of Arkansas and Arkansas Power and Light will come in with \$9,000 in seed money. And then I am going to try to get a match for that \$9,000 from the Arkansas Trail Society.

I am not going to go through all this; this is all listed on the PowerPoint. But you get the idea. You start building, building, building and creating a strategy that makes sense, so that when you are talking with the Arkansas Trail Society, you can say, "I already have the plans that the National Park Service helped put together, or put together for us, and we have raised \$9,000 locally. We would like to have you match that \$9,000." And that way, they see themselves as a part of a much larger picture.

And you should try to share your strategy with the grant makers so they can see where they fit in. Now, generally speaking, you will have...let's say the full budget is \$200,000 for this project. Your strategy, and the grant makers you identify, it may add up to \$300,000. But the reason for that is because you have to realize that some of these won't come through. As good as your research may be, some of these grant makers won't come through for you, and so you have to have people that will fill in. What are your tier 2 funders? Can you pull them in? Or even tier 3 funders that you kind of looked at; can you pull them in to fill in for gaps where folks don't come through with the money you expect?

Once you have developed a set of targeted grant makers for each one of these projects and a strategy that goes along with each one of these projects, then you are going to want to set up your grants calendar. And each project, now, is going to have a specific grant calendar.

If you are looking at the PowerPoint, you can go to slide 10. And this is really a simplified version of it, and you can just use Excel. Each project is going to have a grant calendar. They are going to have a submission date that you set. I always work backwards, so a submission date, a draft date, and then a start date.

So like with the National Parks Service, I just have to fill out forms, but I do have to get a couple of these forms signed by the president, the board, and then I also have to get some

documentation about the land being donated that I need to get to them, and, you know, a few other things.

So I have these forms, so I am going to give myself a couple weeks to do that, besides what is going to happen over the holidays. I want to get this submitted to them by January 10<sup>th</sup>, so I am going to have a draft date of December 18<sup>th</sup> and a start date of November 9<sup>th</sup>, or whatever it is. So you just want to work backwards on your grants calendar, with a submission date, then a draft date, and then a start date.

And I have this thing that I call the two week rule, which I swear by, but you can use it or not use it. But what I try to do is if a grant award is due on, let's say, February 8<sup>th</sup> of 2010, it would show up as due on my grants calendar on January 25<sup>th</sup>, which is two weeks earlier.

And the reason I do that is because, for one thing, if I need the two weeks to get everything polished, I can, but I try to actually mail it and submit it on January 25<sup>th</sup>, which is two weeks early. The reason I do this, and this is all back to relationships about grant makers, the reason I do it is because I want my grant proposal to be one of the first that comes across the desk of the reviewer.

So that program officer that is sitting at First National Bank, or at Arkansas Power and Light, or at the Arkansas Trail Society, wherever it is, I want my proposal to come in early, because you know on February 8<sup>th</sup>, they are going to get, you know, 30 priority mail packages. And those, they just tear open and they go through, make sure they have all the pieces, and put them in a pile.

But if your proposal comes in two weeks early, again, it is all about relationship and credibility. You start to build credibility with the grant maker, and grant makers are usually, at that point, excited about the applications that are starting to come in. They say, "Hey! We got our first application or one of our first applications! Look! Oh, it is from these guys. I wonder what they are doing. Oh yeah, that is interesting!"

And if there is something missing from your application, you are much more likely to get a phone call, especially if it is a private grant maker, you know, not state or federal. But if it is before the deadline, state and federal legally can do that as well.

So what you want to do is you want to get your proposal in as early as possible so that you can fill in any gaps of missing information that they may want to know, so that you build credibility with the grant maker. If you send something along like a map, they might actually put it up or look at it, hand it around, show it to other staff. Are they the decision makers? Maybe not. Do they have influence on the decision? Of course they do.

So just try to get your submission date at least a week or two out if you can. And believe me, what I started to do is, once I decided that this was a good thing and had learned from experience that it was a good thing, I started acting like that submission date was my final

date, and I would work all weekend, just like anybody else would, and go crazy and try to get it in the mail in the nick of time. And of course, it was two weeks early.

Last slide. This is the 2010/2011 grant seeking calendar. And we will have a worksheet on GrantStation for this in a couple of weeks. But what you want to do now is combine all those project calendars into one working calendar. You want to include all the details. Do you need matching money? Where are you going to get it? Do you need collaborative partners? When are you going to sign those partnership deals? All that—all the details.

And then the important thing is to post the calendar in a visible place. I used to post it in my office—fine and dandy. I still had people walking in all the time and asking me, “Can we apply for this money?” And I would pull out my decision matrix and go through it, and all of that.

But I found it was even more effective if I posted my grant seeking calendar outside my office door so people could see how much work, because it is a detailed calendar, was on my plate just in the area of grants that I had to do. And people really would stop and look at it, and they would think twice before they walked into my door and asked me if I would apply for some money they thought for sure we would get.

So keep that RFP decision matrix handy. You should be using it on and off throughout this process. Post the calendar in a visible place. Be sure to include lots of details. And combine all those project worksheets together into one large calendar, and you will have yourself a calendar for 2010.

And that is the end, because I know we are at 11 o’clock. Rebecca, questions?

**Rebecca Higman:** Thank you Cindy for going through all of the prepared presentation information. I am happy to jump right into the questions for you.

So our first question came in from Tony, and Tony said, “Cindy, what do you think of subscribing to grant directories? Are they worth the money?”

**Cynthia Adams:** Well, I live in Alaska, and the only way I could get information for so many years was through the grant directories. I used to subscribe to them, and I would make tons of notes in the books. And I found them useful at that point, but that is why I started GrantStation, because I really needed more current information. And so, I really wanted a tool that I could look up...I am going to use Hasbro again just for the fun of it. But I could type in Hasbro, their profile comes up on GrantStation, and it says, “Last updated 10/2009.” I go, “OK. So this is current information.” So I could use that as the most current information.

I need that last updated date. That drives me crazy. I mean you really need that. Otherwise, it is a lead, but they may have changed completely. I have eight authors and all they do all day long is updating records and adding new ones, and omitting records. And there are so many changes right now that I say the directories aren’t that helpful.

**Rebecca Higman:** OK. Let's see. Our next question came in from Hope, and Hope said, "A colleague told me that she heard not to expect to obtain a grant from a foundation the very first time you apply to that particular foundation. Is there any truth to that?"

**Cynthia Adams:** There is and there isn't. I mean I think if you try to introduce yourself to the foundation the first time out...It all depends on the foundation, as well. But let's say it is a community foundation and you have never really had any relationship with that foundation.

If you can do the homework like we talked about, where you really look through their annual report, and their IRS 990, and their profile, and really do your homework, and then you have one or two very specific questions, that is a very good way to introduce yourself to the grant maker. And it builds credibility, because you are asking questions they know that aren't already answered.

And so when you get on the telephone with them, you want to be sure and say, "I read through the two latest annual reports you have published on your website, and I am fairly sure that you say that you have to have challenge money in place. But does that mean you actually have to have the check, or does it mean you have to have just a pledge?"

Whatever it is, if you can't find the answer anywhere, it is a great way to introduce yourself. Will they give you money anyway? I have set on foundation boards where we have never heard of an organization, but have been so impressed with the application and the project that they were proposing that we said, "Yeah. Let's give maybe not all the money, but let's give some money to this group and see where they take it."

So I say apply. And I say if you can introduce yourself via email or phone first, that is great. But even if you haven't, I say apply. If it fits what you are doing, I would apply.

**Rebecca Higman:** Roseanne would like to know a little bit more about GrantStation. She says, "Does GrantStation offer a trial membership or some behind the scenes look at what it offers so that she can see how it works and she can make a more informed decision of what membership has to offer for her?"

**Cynthia Adams:** Right. We have a couple of things you can do. One, we have an automated tour that you can take on the website. So if you go to [www.grantstation.com](http://www.grantstation.com), on the top right-hand side you will see, I think it says "tour." Click on that and that will take you through. It is me talking, so you get more of my voice, but it is about 17 minutes long, I think, and it gives you a pretty darn good overview of what we offer.

We also do a free Webinar once a month, and that lasts for an hour. We open it up to questions. We do lots of searches for people, so people stay on the line and they say, "I am a little group out of Amarillo, Texas and we are doing after-school programs for children. Can you help?" And so then we do a search for them and show them how to

look for the federal money, the state money, and the private money and what they can expect to come up with.

So we have the free tour, we have the auto tour, and then we have specials that we run, like one we are doing through Network for Good right now. We try to do those fairly often, because \$599 is our published rate, but that is a lot of money for a little nonprofit. And so we try to have specials. And we do have a holiday special online on the homepage right now, or you can get this great offer that Network for Good is offering, which is even better than the holiday special.

So those are your options. But GrantStation has lots of tutorials, lots of searchable databases, and I think you will love it. The end! [laughs]

**Rebecca Higman:** We have a question from Pete. He has a question about gaining credibility with funders and making that good impression. He wanted to know, “With big funders, how do you suggest developing that relationship prior to sending in that letter of inquiry? For instance, many of the funders are located in the east and I live in the west.”

**Cynthia Adams:** Right. Believe me, I know this story. I have been a fundraiser in Alaska for almost 40 years. And believe me, when I first started raising money in Alaska, I would call grant makers and they would say, “Oh, we only give in the United States.” And I was like, “Wait, wait! But we are!” So believe me, I understand.

And I used to make all these trips back east, and make appointments with grant makers, and go in and just introduce the state to them. I mean literally. Not my organization, just introduce the fact that we exist in what we did, and what kind of people we were, and that it was a strong native population, a very strong indigenous culture. It was just this ongoing education project.

And you are right. It is harder to introduce yourself to a grant maker that is on the east coast if you are on the west coast, or vice versa, or a grant maker that is international. And don't forget about those, because there are a lot of international grant makers that will give to small nonprofits in the US. And we have an international section on GrantStation; you can do a search there.

But, again, same thing. Do your homework. Make sure you have done all the research. Make sure this is the right grant maker that you are going to. Just because Kellogg's is a great grant maker doesn't mean that they are necessarily right for you, or Surdna, or Ford, or Macarthur. Just because they are a good grant maker and they give generally in the area that you need funding doesn't mean they are right. So really do your homework.

Once you have done your homework, then emailing them or a phone call and setting up a time to talk with them. Just be sure you script out two or three lines about who you are, two or three lines about your project. Let them know you have done your homework. Tell them exactly what homework you have done, and then say you have two or three specific questions, and can you have 10 minutes of their time? And just be really clear. And even

with an email, just say, “I have two or three very specific questions. Is it all right if I email you, or would you prefer a phone call?”

On GrantStation, we have the email contact and the phone contact if it is at all available. And believe me, if it is not published there, you are not going to find it, because our researchers really dig. And if they can’t get a phone call or an email address, then you are just going to have to send a letter.

But same thing. Request a time to talk. Let them know what research you have done. That is the only way you are going to get through to them, because just trying to educate them about Alaska or educate them about an organization in Alaska, it never really worked.

When I started, I just thought, “Well I will just go to Ford and talk to them, or I will just go to Macarthur and talk to them.” What I found was when I started doing the research and really identified the most appropriate grant maker for my project, because I had done my homework and found that this is the right grant maker, not wishful thinking but really the right grant maker, then I would have real questions I needed to ask them that weren’t answered in any of their publications.

All of a sudden, we had a conversation rather than me trying to sell something to them. It was a back and forth conversation. I hope that helps, Pete.

**Rebecca Higman:** Just one other GrantStation question just to sneak in there. Regan wanted to know, “Is the GrantStation membership per person, or can multiple people from one organization access the service?”

**Cynthia Adams:** You get one username and password. What I always tell folks is it is supposed to be for one person, but the truth of the matter is, if you are small office, share it around. You can use it on any computer. If you have a fundraising committee, just make sure the fundraising committee folks are not using it at the same time as you are or else you will get the “boot.” [laughs] The technology will boot you out. But if you can schedule it so that, let’s say, the fundraising committee person who is going to do funding research...And by the way, that is a great thing to do, is fill out those project descriptions and then have the fundraising committee do funding research, the grants research, for you. If you do that, make sure that they are just doing it on weekends or maybe weeknights, or something like that, so that you can use it during the day.

If you have lots of field offices or you have a lot of people that want to use it, then just get in touch with us and we will make sure that we can get you a price that is reasonable and works within your budget. Did that do it?

**Rebecca Higman:** Yes, absolutely. Maybe we can round out with Holly Sue’s question, because the whole call today was centered around being strategic and planning ahead. So her question says, “Do we need to continue to check back throughout the year after we have made our plan and add grant options to those 12-18 month strategies? Do grant

makers really have deadlines 12 months out?” And a final question, so I guess this is a three parter, “Do grants become available with super-short deadlines, meaning I need to constantly keep my eye out?” So what are your suggestions for Holly Sue and others on the phone throughout the year once they have already set up their plan?

**Cynthia Adams:** It is a great question, actually. The project description worksheets are organic, which means they will be changing all the time. You will constantly be changing the dates on them. You will be adding new grant makers that come along that you have run through your matrix, and they really work well, and they fit perfectly for this project. So you may add that one and maybe eliminate one or two that weren't quite as strong, and you were kind of worried about them anyway, so you might take those out.

They are very, very organic documents. There are many grant makers that will list deadlines way out in front, especially federal and state. Well, state not so much, but federal. We have a whole file on deadlines for 2011. There are some for even 2012.

And so, you will get a lot of federal money that will have deadlines that are farther out. You will also have grant makers that give every year in maybe May and again in September, and so the exact dates haven't been announced, but you can see, if you do your homework, that they always give in May and September. So you can count on them coming in around that time or submitting a proposal around that time.

The thing I didn't mention that I think is important, Holly, is on your grants calendar, try to have a column when you think the grant award might be, because then you can start looking at... That is one of the questions I often ask a grant maker and often isn't published. We have a whole set of questions that you can ask the grant maker on GrantStation as sort of a guide, but one of the questions you may want to ask a grant maker: “I know you have a June 17, 2011 deadline. Do you know when those awards are made?” And they say, “Oh yeah. Our board doesn't meet until October 1<sup>st</sup>, and the awards are announced, usually, October 20<sup>th</sup>.” You are like, “Whoa! October 20<sup>th</sup>? Here I was thinking I would know about that by August!” So knowing when the award is going to be announced is always a good question to ask. And it leads into this whole idea of the strategy, which, if the grant maker says, “Oh, it sounds like you have a time crunch here,” and you say, “I don't really have a time crunch, but I have a grant strategy built around this project, and I think knowing when the awards are help me figure out the best way to move that strategy forward.”

So yeah, it is a very organic document. Be sure and add an award announcement in there. What were the other questions?

**Rebecca Higman:** And, “Do grants become available with super-short deadlines?”

**Cynthia Adams:** Just sort of another rule of thumb. When you develop your RFP matrix, timing is one of the critical criteria that you are going to add to that matrix, and do you have enough time to respond? That is going to be hugely different answers for different organizations. If you are an all volunteer organization, you are going to need a lot longer,

unless you have a volunteer grant writer, you are going to need a lot longer to respond to a grant request than if you are an organization that has three development people on staff and they can all drop everything and work together to put together the proposal.

So the timing, the criteria on that matrix, that is incredibly important, the weight that you give to timing. And it is all going to depend on, really, how fast you can put together a proposal and how many documents you already have developed that you can use for any grant proposal that may be drafted.

So again, on the GrantStation website on the homepage under “Tracks to Success”, that is the name of the series, it is “How to Build a Grants Calendar”, right now we have step by step on how to put together that RFP matrix. Just go to the homepage and click on that article, and then maybe cut/paste it or download it or something so that you have that. That is a real tutorial on how to do that.

**Rebecca Higman:** That’s perfect. Thank you for sharing all the advice. As we mentioned, there are a few other questions that we didn’t get to, so we didn’t forget about you. We will follow up after the call and make sure to get everything covered that we can.

So first, I just want to thank Cindy for being with us today.

**Cynthia Adams:** You are welcome.

**Rebecca Higman:** Thanks everybody, and have a great rest of your day!

**Cynthia Adams:** Thanks Rebecca!

**Rebecca Higman:** Thanks! Bye-bye.

**Cynthia Adams:** Bye-bye.