

# Grants Webinar

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## SUMMARY KEYWORDS

grants, organization, people, funding, foundations, nonprofits, great, foundation, serve, taproot, listservs, search, opportunities, volunteer, relationship, prospect, funders, contact, research, work

## SPEAKERS

Cecilia Landor, Sameena Usmani

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**S** Sameena Usmani 16:12:38  
Good afternoon, everyone. Welcome to taproots webinar, our grants 101 plan your grants calendar to build long term funding relationships.

**S** Sameena Usmani 16:12:48  
My name is Sameena Usmani and I'm the Content Manager here at taproot. And before we begin, I'd like to just go over a few logistical notes. I'm joined by a taproot colleague, Cierra Moore, who will be covering the chatbox. Today during today's presentation, and all attendees will be muted. So please ask your questions, make comments in that chat box. And go ahead and introduce yourself and your organization right now. And this webinar is being recorded.

**S** Sameena Usmani 16:13:19  
So we will share the recording and an email later today. And AS you can see, we have turned on closed captioning, but you do have the option to turn them off for yourself. If you go to the right sidebar next to AV pod, you click on the gear icon, and then you can toggle off turn on captions.

**S** Sameena Usmani 16:13:46  
And now I'm thrilled to introduce our guest speakers this year landour. She has worked in public serving nonprofits for over a decade, primarily in grant writing and strategy. Cecilia, thank you so much. And welcome.

**C** Cecilia Landor 16:14:01  
Thank you. Hi, everyone. Thank you so much for attending this webinar. I'm super excited that

you are all here and ready to learn about grants.

**C** Cecilia Landor 16:14:11

So let's get started. This grant webinar is sort of split into two parts. So the first part we're going to talk about how to plan your grants calendar, how to create a really robust roster of grants that you can apply to. And then in the second part, we're going to turn to how to leverage what you've built into really great long term funding relationships. So here's just a little overview of where we're going. And let's get started.

**C** Cecilia Landor 16:14:39

So first of all, when you're searching for the grants that you're going to apply to, you're going to be casting a wide net. And so this is going to look a little different for each organization. It might depend on the kind of funding you need, whether you're trying to grow your Grants Program, maybe you're applying for just a few this year, or you're really trying to build out your funding. Either way, you want to make sure from the various top that you're starting with a really wide net. So this includes kind of an internal and an external component. So inside your organization, you want to be able to find all of the grant opportunities that are related to your work.

**C** Cecilia Landor 16:15:17

So locally, if it's a geographic area, you know, people wanting to find your town, city or state, or subject matter what your organization is serving their mission. And so there's a lot of different email listservs, you can get on a lot of different bodies, governmental, like advocacy organizations have listservs, and they will send out opportunities that come up. So a first step is just making sure that you are on all of the listservs, where you can get funding opportunities you don't want to be missing out from since these opportunities can come up with pretty short notice of just a month or two. So making sure you have access is just a great place to start. And then the external component is how can you make your work searchable, available and accessible online?

**C** Cecilia Landor 16:16:06

If you were a funder, would you be able to find your organization? Would you be able to find your organization if you were seeking out, you know, the specific area of work you do in this specific geographic area you're located. So making sure that the people who want to be seeking out your work are able to find it on your website through social media, through connecting to public media and opportunities, either on radio magazines websites, just making sure that you're putting your name out there. So people will come across it and when they see it will want to know what your organization does.

**C** Cecilia Landor 16:16:45

So moving forward. When you're doing this search, you want to use all the tools in your search in your toolbox, which is a lot more than you might think. If you're part of this grants process in your organization currently, you might be aware of these different foundations search tools Foundation Directory, online foundation search are two of the more popular ones. I know candidate instrumental are newer and I think they're becoming more popular. These are a really great place to start and they're kind of going to be your bread and butter for finding foundation prospects. Unfortunately, because of the way that the grant searching process works and if you are already have a subscription to one of these, you probably are aware of this.

 Cecilia Landor 16:17:30

It's very difficult to just search for grant opportunities. It's very time consuming and it takes a lot of At first a lot of kind of knowledge about like how to search, how to do like terms and connectors searches on Google. And these search tools really bypass that whole process and allow you to search and filter very specifically.

 Cecilia Landor 16:17:53

So, you know, if you are a healthcare organization, you can search for foundations, serving specific areas serving specific type of health care organizations, who have funded specific organizations. So this is really a great database, when you're starting to create a list of grants that you want to apply to, and you want to come up with a comprehensive list of funders, this is going to be probably where you're going to start. Second, is what we call reverse engineering, your search.

 Cecilia Landor 16:18:23

So looking to not necessarily the foundations itself themselves, but the nonprofits who are similar to you're doing the work that you're doing, and the other foundations who are supporting them.

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So if you are, again, let's stick with the example of a healthcare organization and you serve youth, seeing what other organizations in your area or perhaps nationwide, serve youth and have that health care component. And that allows you to see, Okay, who else is funding these organizations, there might be people that you were just simply not aware of, but you know, now that they're interested in this work. And so this is done through these tax forms called Nine, nine views. And if you already are in the grant process, you might be aware of these forms AS places you can go to find really valuable information about our nation.

 Cecilia Landor 16:19:19

So they're required to report certain things, how many grants there, they're donating each year, how many, how much money, how much. And then you can see a breakdown of the

year, how many, how much money, how much. And then you can see a breakdown of the grantees and how much money they're giving to each to each nonprofit. And so I'm just gonna pop to the next slide. Real quick, this is a prospect research template. And this is going to be available after the event. And so this is a really great tool. A lot of the issue in terms of prospect research is kind of time related.

 Cecilia Landor 16:19:55

You know, this is pretty intensive research and nonprofits, you know, we're all really strapped for time. And so this is something that's really good to have interns due to have people who want to support your organization, but don't have maybe the credentialing they need for client contact for volunteering. This kind of volunteering is really great to have people do.

 Cecilia Landor 16:20:17

So that's something that you can make use of interns for, you know, a lot of times people, college students, high school students want to volunteer with nonprofits, this is a great task. And then what you can do, AS the expert is analyze what they've researched. So they'll present to you filled out template form, and you having these forms for the various foundations that you want to approach will help you build a more strategic plan. And help you approach these with a little more planning, which will help you in terms of actually getting the grant itself.

 Cecilia Landor 16:20:52

So in addition to interns, board members are going to be your other tool in your people power toolbox. Board members have a lot of different connections, and they're there because they want to support your organization. Think about how you can send them off to do work for you.

 Cecilia Landor 16:21:10

People will ask you, if they can do favors, think about how you can use them, do they have connections to a foundation, in that prospecting template sheet, you can put the board lists of the foundation and see if there are any connections between your board and the board of a foundation if it's local, or if it is more driven by a specific mission or subject matter.

 16:21:37

Okay, moving forward. So variety and prospects, just for longevity and your your organization being able to have funding year to year, you want to make sure you're getting a good mix of different types of grants. So if you're in the grants process already, you know that there's different types of foundations and applying to a variety of them, it can just be really helpful in terms of making sure you're able to get funding for mission driven foundations. A lot of them have focused areas that they continue to find year after year, but sometimes they may have, for example, after 2020 and the Black Lives Matter protests.

C Cecilia Landor 16:22:20

There were a lot of foundations turning to racial justice funding. But you wouldn't want to you know, only have your organization funding from one of those types of programs because it is likely that the foundation is going to kind of roll over and turn over programs that are more atemporal even though that shouldn't be a factor. So this can be a good place to just make sure that you are also casting a wide net, and not limiting yourself right off the bat.

C Cecilia Landor 16:22:52

This is another kind of from the top piece, when you are assessing what your grant needs are for the year, make sure that you are looking ahead and make sure that you're thinking of what kind of grant funding you want, in terms of what kind of other funding you've got.

C Cecilia Landor 16:23:09

So I think we all kind of have an idea of how much we would like that probably isn't, isn't AS realistic year to year. And a lot of funding should come from individual and events. But figuring out from the top, when you start your process of creating a Grants calendar for the year or the next fiscal year, figuring out what your funding needs, and how many you need to how many grants you need to apply to in order to meet that knowing that because of various issues along the way, you will likely not be able to get all the grants that you apply for.

C Cecilia Landor 16:23:50

So Turning now to the next part of the presentation, we're going to talk about how you leverage what you did in the planning your grants calendar phase to building the long term funding relationships that will keep your organization going. So the first one is take your time with prospect research, this is going to be impressive research might be 70 to 80% of the time that you spend at work if you are a fundraiser and the reason that it is so much and it mean, maybe it doesn't seem like it should be that much.

C Cecilia Landor 16:24:24

But this kind of pre work will be very helpful when you eventually turn to the writing of the grant. I think that we all tend to feel like we'll be able to write a really persuasive, compelling grant that you know, will get the program officer to fund us even if we're not exactly in the right, kind of in their right focus area. If we come at it from an angle, and we write it really well, maybe we'll get funding. And I think that you know, that is possible, that doesn't never happen.

C Cecilia Landor 16:24:57

But it is also just, I think, a much more stressful process than spending a lot of time in the prospect research phase. And then making sure your prospects are really good and really on point with what your organization does. So even though it can feel like a lot of effort, and

maybe you know, this is why it's great to have interns do some of this work, because it is so time consuming.

 Cecilia Landor 16:25:22

But this will really help set you up for success, because it can just be so frustrating to apply for a grant that you you know, sticking with the healthcare example, perhaps they fund health care for the aging and aging population and you find or you serve youth, even though you're both in the health care bucket, the fact that they primarily serve the aging and elderly populations might mean that even though they really liked the work that you're doing, they're just not going to be able to fund it.

 Cecilia Landor 16:25:56

And part of that is the relationship is not just with your program officer. But when they bring it back to their board and say, Can you fund this you are having to convince not just your program officer but their board. And so that can be just really disappointing to not be able to get it because it turns out to be not directly in line with what they want to fund.

 16:26:22

Find your ambassadors. So this is similar to the people power idea. There are people who will want to go to bat for you in a lot of different places. So board members, people who want to support your organization, but not at the level of the board. These are all people who can do things for you. I think that we don't, especially working for nonprofits, there tends to be this.

 Cecilia Landor 16:26:51

You know, I can do all the work myself. But really, I think that people underestimate how much people want to help other people. And asking people for little favors. can really go a long way in just making these relationships. And then the external ambassadors piece is really important too, because your program officer and foundation contacts are going to be the people who you talk about your programs with and try to get funding from and you want to be creating good relationships with them so that you can get funding from them but also because the funding community is small, and you know, they're they have their own connections. And so having your external ambassadors, your program officers and the people at foundation to really say you know, X qYZ nonprofit, they just do great work, I, you know, I really have great relationships with people there that will go really far in terms of being able to connect with other people. And then create roles. Help people who are interested in get involved. So this could be like the prospect template sheets, if there are people who want to volunteer with your organization, but you know, they don't have if you're a client serving organization, they don't have the credentialing needed. Helping with volunteer helping with fundraising can be a great thing for volunteers to do, especially this kind of research where, you know, I think people get kind of scared of fundraising, they don't want to ask for money, it feels icky. But this, the grants process is built, AS you guys know, for people to ask money, you know, I think it's already implicit in there. And so doing this research, I think, can be really easy for people to do, who

maybe feel a little more uncomfortable with traditional fundraising. So finally, developing the relationship with the funder. So this piece is kind of the most important part in a sense, but also everything else has led up to this part. So when you were researching prospects, and doing your prospect template sheets, and finding organ or font foundations who had served organizations similar to yours, and funded organizations, similar yours, once you found that foundation, and once you've begun, that contact, then becomes the relationship building of how do you get them on board, to want to fund your organization in a long term fashion. So how I like to think about this is how can you serve each other. And I think,



16:29:36

particularly in fundraising, you know, asking people for things is hard, but they also need something from you. If it's a foundation, they need to fund your work. That's the goal of the foundation, they want to support, housing, health care, youth education. And they can't do that without your work. And also, they want to brag about you, they want to brag about what the work you're doing is and what the work of your organization is. And so it really is a mutual relationship.



16:30:08

It may I think, reframing like that can help in order to kind of facilitate this relationship, because I think sometimes it can feel like, Oh, I'm just, I'm just asking them for money. But if you work at this, developing the relationship a bit more. And there's something called the moves management, which is its own sort of system of moving funders, up and up a relationship ladder. But once you start focusing on that, then it becomes much more personal. And you'll start to know your program officer and what they're looking for.



16:30:43

So that can be candid conversations with them, you know, maybe a foundation or maybe it's a corporate giving program, maybe they're new to an area and they want to kind of assess the landscape, and you can help them by, you know, explain showing them other nonprofits doing similar work in your area.



16:31:03

Or perhaps it's an organization that has a very large staff, and they want to do a volunteer day. That's something that your organization can provide them. And it helps both you and them, you're providing, you know, the service, I think a lot of corporations nowadays, especially, really want to make sure that they are giving back and you are providing that opportunity for them. And you're also built continuing to build a relationship with them where they're like, Okay, this nonprofit is a partner of ours, we're working together to combat a social issue. So I think that, you know, there's different ways to do this.



16:31:41

I think if it is a corporation, volunteering is really great. It's a great way to make people feel involved. And it is a really great way to bring in people who maybe were not aware of your organization, but worked for the company that you have a corporate social responsibility grant with, and they can learn about your organization, and they'll share it with other people. So kind of another one of these like, internal external combinations. And making sure you're in contact with them. So you'll be sending them proposals and reports if you are a grantee and you're in their grant process, but also send them other contacts. Like it doesn't have to be constant.



16:32:25

You probably don't want it to be constant. But how else can you show them that you're thinking of their organization and their organization is helping yours so maybe sending them an update? an infographic, a picture of, you know, if they volunteered like a picture of how the work they do helped just these little points of contact really helped to serve really help and serve to facilitate a strong relationship that will have them going to bat for you.



16:32:57

Because once you have built this relationship, you know, they're going to want to be vested in the work of your nonprofit, not just for their own organization, but because they care about the work your organization is doing. And so this really, it leveraging that contact with them, helps you get more funding from them, and also just helps you in the funding landscape in general. So that is the presentation on grants 101. And we're really happy to answer any questions you have. So I'm gonna pass it back over to Sameena. For questions.



Sameena Usmani 16:33:36

Great, thank you so much, Cecilia, we we have some great questions coming in, please keep adding them. First question is how do you get on the listservs? That you were mentioning?



16:33:48

Sure. So I think a lot of things are going to be connected to government agencies, universities, systems, state university systems, and kind of advocacy groups. So I would say, if there are any government agencies, that you are aware of that serve your population, I would look to look on their websites get in contact with someone there because they will no of the list or the existing list serves.



16:34:23

And I think that's true about universities to if you have, you know, especially for kind of Human Services, facing work, universities who are engaged with like who are work with those populations in some capacity, law, school, social work, schools, those are going to be great places to go to, to, I think like institutions will have a lot of this knowledge already. And so you



can just ask them, Where Are They current, because they'll also be wanting to be on listserv so they can get funding opportunities. So I think finding, finding people who are currently in those spaces, and just asking them, where they are seeing opportunities currently, and what listserv they're on, is a great place to start.

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Sameena Usmani 16:35:11

Great. And do you have to pay for these search tools.



16:35:16

So unfortunately, you do have to pay, they do seem to all have a subscription model for these search tools. But I will say they're, the price points vary a lot. And I think that it is more than worth it. I think, what you can do if like, of course, money is tight for many nonprofits. And I think these aren't subscriptions that you have to have permanently.



16:35:41

The other thing is, if you are in a major city, you may have an office of I'm from Chicago, and we have something called forefront there. And so you can go to the forefront library and use their resources. So it's possible that wherever you are, there might be something similar, where there is like a fundraising library, like a nonprofit of sorts, where you can have where you can like access that subscription for free.



16:36:11

But even the paid subscription, I would say is worth it if you're able to do it, you know, maybe a month or so a year and just see what else is out there because new foundations are being created all the time.

S

Sameena Usmani 16:36:24

Okay, great. And what are your thoughts on grantwatch?



16:36:29

grantwatch? Yeah, I would say grantwatch is not one of the best. I think What's hard is it feels like it like a more free version. But it really isn't it you know, the the opportunities are, they do have like there is like a paywall format behind it. And so I would say like for your own peace of mind, it could be really worth it. I'm really helpful to get a subscription and to just spend a little time you know, making a list because once you have the list of foundations, you can go off and do all your own research.



16:37:04

All the websites are available just publicly on Google. But for some reason, there's just this issue of finding, you know, gathering a list. It's very time consuming. I think the way to go. The way to not do that is do the reverse engineering your searches. So seeing who else is funded, is getting funding. If there are organizations who serve similar populations, I would say that is probably my best recommendation. overground watch



Sameena Usmani 16:37:37

Okay, great. Um, so someone is saying many foundations say they don't accept open solicitations. How do you go about connecting with foundations if their process is closed?



16:37:50

Totally, this is a great question and something that, yeah, we have to deal with a lot. So the first thing is, if it's closed, don't submit a grant, like, they'll just, they'll just reject it. And it'll be kind of a wasted opportunity, what I would do is send a letter of inquiry, war and or make contact with a program officer over email.



16:38:14

So they're, if they're still, if they're interested in your focus area, I think it's, it's going to be a much kind of harder battle if they're not specifically interested in your focus area. But, you know, this is the thing where it's making contact with people. I think having just like having that human contact of this is what my organization does, is this something that you are interested in funding can be very helpful.



16:38:39

And I think a lot of places do have this closed solicitation thing, because some, they get so many unsolicited applications that are just completely outside their funding areas. So making the effort to reach out to a program officer and show them you know, I've done my research, I know that your organization funds work similar to ours, here's what we do, can I set up a conversation with you or send them a letter and say, you know, these are outcomes from this last year, we work within your area, and we'd love to explore the possibility of getting funding. So there's definitely don't see it AS like, a locked door, but just something that you can try to get around with some personal contact.



Sameena Usmani 16:39:24

Okay, great. And which grant search tool would you recommend?



Cecilia Lander 16:39:29

 Cecilia Landor 10:59:29

Sure, so I, the ones that I have experienced with our Foundation Directory Online and foundation search, both of which I think are very good. I think foundation search might be a little more expensive. But Foundation Directory Online, I think was formerly called Foundation Center is excellent, very easy to use. And I think a bit cheaper, and that's the one to that you may be able to find a library, maybe a university library that already has access to that. And you can just go use it on occasion. But I think the those two Foundation Directory of Foundation Center Online.

 Sameena Usmani 16:40:09

Great, and how do you find international donors or organizations?

 Cecilia Landor 16:40:15

So those websites should also include funders outside the US? I think most people if you do use them to search within, you know, by state if their organization is serves Wisconsinites or something like that, but they are they fully are international. And I think for international to getting unless serves AS a great idea. The government different government agencies have various opportunities. And I think government funding for international work is a different process than government funding for work here. So I would look both for in government, governmental agencies for that, AS well AS those those resources.

 Sameena Usmani 16:41:05

Great. So we only have, like one minute left, and I wanted to go over some remaining issues. But I do want to ask, please keep adding those questions. If we haven't answered your question your concern, we will try and answer them after the event. But I did want to go ahead and lead one great question is, are there taproot volunteers available that can help support in prospect research, help applying to grants? And that goes right into my next comment?

 Sameena Usmani 16:41:38

Yes, they are here. They are available to help with any aspect of your grant process, the grant strategy helping you write your grants, please just go to [taproot. plus.org](https://taproot.plus.org). And you can sign up and you can register and start posting projects, to try and find your skilled volunteer. And now with that, I also just wanted to let everyone know, our next webinar is October 25. And it is get your nonprofit the support you need for free is actually during the global pro bono week. So we do welcome everyone to join for that one. And on behalf of taproot I just want to give a huge thank you to Cecilia, thank you so much for your insight. And for everyone. You know, we'll be sending an email later today with helpful resources that Cecilia showed and a recording of The webinar. I want to thank everyone for attending and have a great day.

 Cecilia Landor 16:42:43

Thank you so much for attending. I really glad about your participation. I'm glad this was

Thank you so much for attending. I'm really glad about your participation. I'm glad this was helpful. Great