

How To Get to
Know a Funder

BEFORE

Applying for
Their Grant

WORKBOOK

Now that you have read all about how to get to know a funder through their form 990, it is time to take action.

The Goal

The overarching goal of this exercise is to see whether the foundation that you are interested in has funded organizations similar to yours in the past. It doesn't make any sense to apply for a grant from a foundation that has never funded an organization like yours, whether it be because of your mission, your size, your location, your project, or something else.

If you find throughout this exercise that the foundation funded organizations similar to your own, then you have a better chance of being funded. You will also learn about the size of grant you should ask for.

What you will need:

- A foundation that you are interested in learning about from their 990 (particularly one that you want to apply for a grant from)

In this workbook you will:

- Find 990s from potential funders
- Find and highlight important information in each 990
- Analyze information in each 990

Foundation Name: _____ (the foundation you have chosen to use for this exercise)

Foundation Background Information

You can typically find the following information on the foundation's website. If, for some reason, the foundation does not have a website or you cannot find the website, then contact the foundation directly by phone or stopping by.

Location(s):

Funding interests/priorities:

Mission Statement/Purpose:

Additional information about the foundation:

Analyzing The 990

Now that you have gathered some background information about the foundation of interest, it is time to find their 990. If you have a premium Guidestar account you should be able to access it on Guidestar. Otherwise, try looking it up on Google or on the foundation's website. If you can't find it in any of these places, send a quick email or make a quick phone call to the foundation to have them send you a copy.

Once you have the 990, pull it up on your computer or print it out because we are going to use it for the rest of the time!

Step 1: Total Giving Amount

Locate the total amount of money that the foundation awarded in grants and charitable gifts (This should be located in Part 1 of the 990)

Total Giving Amount: _____

Step 2: Number of Grants Awarded

How many grants did the foundation fund?

This could either be in the actual 990 or in an attachment. It will be a list of organizations with the amount that was awarded, and it might also have information about the type of grant that was awarded, the location of the organization, etc.

Step 3: Amount of Funding Awarded

Looking through the list of funded organizations, list the following:

The range of funding: (lowest amount of money donated to an organization - highest amount of money donated to an organization)

Range: _____ - _____

Average amount of money awarded: (find the average by taking the total amount of giving money from step 1 and dividing it by the number of organizations that were funded)

Average: _____

You might also want to make a note if there are outliers, or amounts of funding that don't fit in with the rest of the grants awarded. For instance, say you are looking at a foundation that awarded the following:

Organization 1: \$2,500

Organization 2: \$3,000

Organization 3: \$1,500

Organization 4: \$33,000

Organization 5: \$3,000

Organization 6: \$7,000

I would probably calculate my average and range without the award given to organization 4 that received \$33,000 because this number is not typical of their giving pattern. While I would love to say that our organization could be awarded \$33,000 from this foundation, it seems like there must have been something else going on that make the foundation give that organization so much more money than the rest of the organizations. Perhaps the foundation knows that organization or has a daughter or son who works with that organization.

Outliers:

Step 4: Types of Organizations Awarded

Looking through the organizations that were awarded:

- Do you recognize any of the organizations?

- Where are the organizations located?

- What kind of projects do these organizations provide?

- Do you know anyone who works at one of these organizations? Is it someone you could contact and ask about the foundation or about the grant application?

- Are the organizations large or small that were awarded?

- How do these organizations compare to your own organization? (similar mission, similar size, similar location, etc)

The more commonalities you find between the organizations that were funded and your own, the better.

For instance, let's say that your organization has an annual budget of \$300,000. You are an animal shelter, and you are located in Idaho. The foundation that you are looking at is also located in Idaho and 6 of the 9 organizations that it funded last year were organizations working with animals. Additionally, you noticed that these organizations are similar in size and operation to your own.

Those are all good things.

Now, let's say you were looking at another foundation.

This second foundation funded 10 literacy programs and 5 after school organizations. There is a pretty good chance that your organization is not going to be a good fit for this foundation.

Digging Deeper into the Organizations

From the list of organizations that were funded, pick 3-5 to find their website and find:

- Their Mission Statement
- Their projects
- Their location

Then, draw a conclusion as to why they were funded by the foundation.

The conclusion can reference the location of the foundation, the funding priorities of the organization, a possible personal connection (such as a board member being connected to the organization), or anything else. Also, you can always contact the organization or the foundation and ask if there was a personal connection or another reason it was funded.

Here is an example from the article:

Organization 2: Pacific Garden Mission (awarded: \$10,000)

Mission Statement: “To serve the physical and spiritual needs homeless men, women and children”

Projects:

- Overnight sleep arrangements for men, women, and children
- support programs
- food programs

Location: Chicago, IL

Conclusion: The Pacific Garden Mission could have been awarded the grant money for their food programs. Since one of the goals of YUM Brands Foundation is to “feed the world,” they are likely to care about feeding the homeless anywhere that they have franchise stores.

Now it's your turn:

Organization: _____

Website URL: _____

Mission Statement:

Projects:

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Location: _____

Conclusion:

Organization: _____

Website URL: _____

Mission Statement:

Projects:

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Location: _____

Conclusion:

Organization: _____

Website URL: _____

Mission Statement:

Projects:

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Location: _____

Conclusion:

Organization: _____

Website URL: _____

Mission Statement:

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Location: _____

Conclusion:

Organization: _____

Website URL: _____

Mission Statement:

Projects:

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Location: _____

Conclusion:

