



Welcome! While you wait...

Jot down **WORKSHOP50** to save \$50 off your first month, or **WORKSHOP2MO** to save two months off an annual plan 😊

Lastly, this presentation is being recorded 🎥

You'll be 📧 emailed slides and the recording afterwards.



Share in the Zoom chat!

- Name
- Organization
- Title (what you do for your nonprofit)
- Your nonprofit's mission or latest initiative
- How familiar are you with Instrumentl
- Your **biggest challenge related to prospecting**

How to Find Good Fit Funders Under 60 Minutes

Celia Daly

Partnerships Marketing Manager, Instrumentl



I'm Celia from Instrumentl!

- Host weekly grant workshops with expert educators and best-selling authors
- Instrumentl helps 2000+ nonprofits in finding, tracking and managing their grants
- Every day, we hear and see what blocks nonprofits from achieving their grantseeking goals





Does this resonate with you?

You feel ill-prepared... in your organization's ability to consistently find good fit funders and apply for grants.





Does this resonate with you?

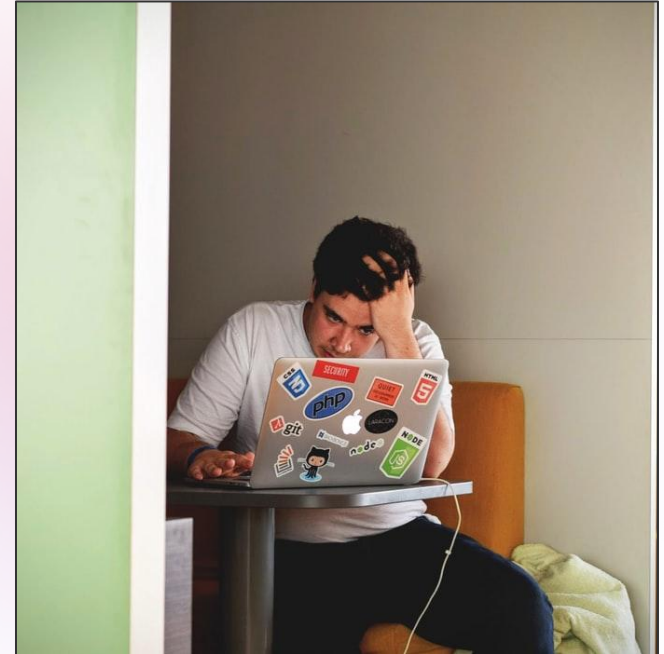
You feel overwhelmed... by the number of things you have to do when it comes to grantseeking.





Does this resonate with you?

You feel Writer's Block... because you carve out time wanting to write a grant but end up staring at a blank screen.



You think to yourself...

“Are grants worth all the effort?”



The answer is YES!

- 87,000+ grantmaking foundations
- 11,000+ active grants on Instrumentl alone
 - We add ~100 every week!

This doesn't have to be you.

- **49%** of nonprofit employees expect cost cuts this year
- **50%** of nonprofit leaders have seen a drop in individual /corporate donations
- **40%** of nonprofit leaders saw a boost in foundation contributions

Agenda



Where we're going today

- Why grants are so powerful
- What is prospect research
- How to start finding good fit funders with Instrumentl

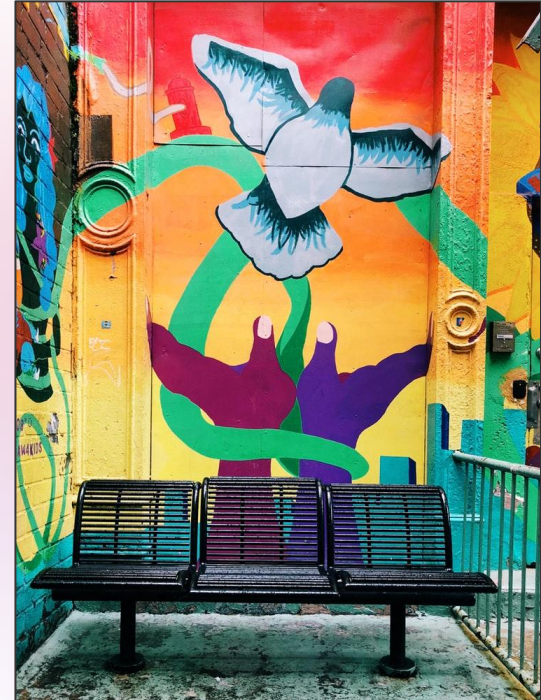


Be sure to stick until the end for a **special 40-page resource to help you in your prospect research!**

Why grants are so powerful

💪 Why grants are powerful

- Broad funding possibilities
 - Education / Outreach
 - Project / Program
 - General Operating Expense
 - Capital Project
 - Training / Capacity Building





Why grants are powerful

- Foundations must give every year!
- **The Minimum Distribution Rule** means foundations give 5% of the average market value of its net investment assets
- Bulk of these distributions go to grants

[Learn more in our workshop with Margit Brazda Poirier on How to Thrive in a Pandemic Economy](#)



Why grants are powerful

Foundation Directory | New York | New York

New York Community Trust FUNDER

990 REPORT
New York Community Trust - EIN
133062214
New York, NY - Instrumentl

RECIPIENT Change View ▾

✉

Overview			
Based on most recent IRS 990 filing (2019)			
Total assets	\$2,910,364,182	Total giving	\$172,671,689
Average grant amount	\$172,140,817	Median grant amount	\$172,140,817

Contact Information			
EIN	133062214	Phone	212-686-0010
Address	909 THIRD AVENUE SUITE 22ND FL, NEW YORK, NY 10022-4752	Website	www.nycommunitytrust.org

$$\begin{aligned} &\$2,910,364,182 \times 0.05 = \\ &\$145,518,209 \end{aligned}$$

\$146 Million!



Why grants are powerful

- Many foundations are consistent in giving
 - Keep sustaining impact, and they keep funding
- Grants can be systemized
 - Clear steps to take to get to submitting a grant
- Grants help organizational accountability
 - This means more feedback loops for you

? What is prospect research?

? What is prospect research?

- The process of finding, assessing and qualifying public, private, and corporate foundations to pursue more strategic and planned giving.
 - “Find Your Funding”



Image Source: [Carthage College](#)

? Why is it important?

- “Virtually every nonprofit has high-capacity donors hiding in plain sight. A whopping **40% of donors in a recent study admitted they could give more than they currently are**. Our job as fundraisers is to identify those prospects so we can start moving them up to greater levels of giving.”

? What info is available on funders?

- Key stats on assets and giving patterns
- Names of key individuals
- Giving trends and cycles over the years
- Lists of past grantees and funded projects
- Geographic areas of focus
- Overall grant eligibility requirements



instrumentl

Quick find

Master Tracker

+ Project

PROJECTS

Air Quality

Alex Von Humboldt

Environmental Project

Alex Von Humboldt

Food Security Project

Alex Von Humboldt

Homeless and Elderly

Alex Von Humboldt

Homeless Shelter

Alex Von Humboldt

Liz's Awesome Project

Alex Von Humboldt

Mental Health

Alex Von Humboldt

New Kennels

Alex Von Humboldt

Give \$50, Get \$50

Document Library

Help

Account

Foundation Directory | California | Emeryville

Clif Bar Family Foundation

FUNDER

RECIPIENT

Change View

990 REPORT

Clif Bar Family Foundation - EIN 204345935

Emeryville, CA - Instrumentl

✉

♥ Saved to Tracker

+ Add New

APPLICATIONS

YEAR	OPPORTUNITY	PROJECT	STATUS
2023	Clif Bar Family Foundation Small Grants	Liz's Awesome Project	Planned

RESEARCHING

2022	Clif Bar Family Foundation Small Grants	Food Security Project	Researching
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Active Grant Opportunities

Clif Bar Family Foundation Small Grants

Overview

Based on most recent IRS 990 filing (2019)

Total assets	\$2,251,374	Total giving	\$3,494,100
Average grant amount	\$5,993	Median grant amount	\$5,000

Contact Information

EIN	204345935	Phone	510-596-6349
Address	1451 66TH STREET, EMERYVILLE, CA 94608-1004	Website	www.clifbarfamilyfoundation.org

Key People

Title	Name
President	Kathleen F Crawford
Secretary/Treasurer	Gary J Erickson

CONTENTS

Active Grant Opportunities

Overview

Contact Information

Key People

Key Financial Stats

Grant Amounts

Past Grantees

Openness to New Grantees

- Total Giving

- Grant Amounts

Giving by NTEE Code

990 Forms as PDFs

Past Grantees

All-time ⚡

2019

2018

2017

2016

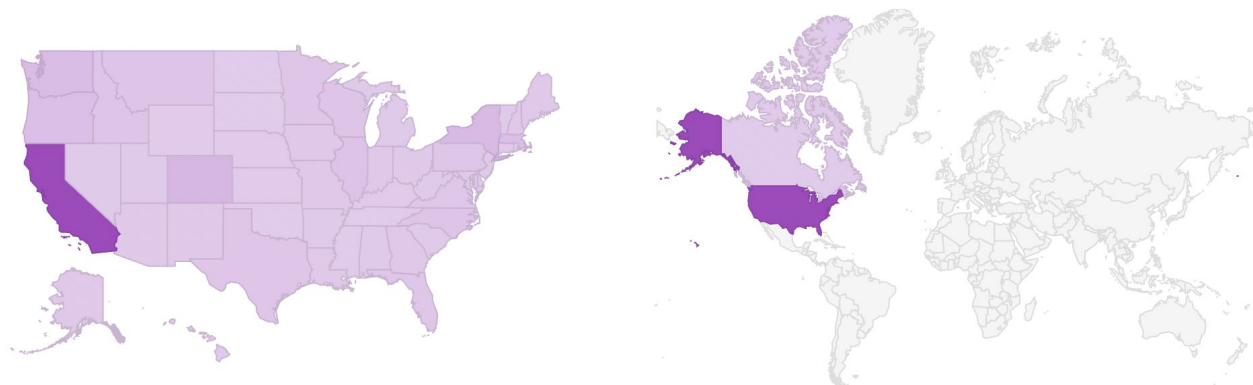
2015

2014

2013

2012

There were **3,634** awards in the past **8** years. Who received these awards, and where are they located?



All states ▾

Search



NAME ↕	YEAR	LOCATION	AMOUNT ↕	PURPOSE
1000 Friends Of Iowa	2019	3850 MERLE HAY RD STE 605, DES MOINES, IA 503101324	\$2,500	Keeping climate action on the front burner
1000 Friends Of Iowa	2018	3850 MERLE HAY RD STE 605, DES MOINES, IA 503101324	\$2,500	Expanding organic food & farming



16 Qs to Help You Evaluate Funders

**Stay with me to get our 40-page
resource including these 16 Qs**

5 Grant RFP Overview Qs to Ask

1. What's the grantmaker's mission?
 - a. Does it align to your initiatives?
2. What are the specific goals of the grant RFP?
3. Do you meet their eligibility requirements?
4. What's the size of grants being made?
 - a. Does it align with your budget needs?
5. What type of grant is this opportunity for?



2 Giving Median Qs to Ask

1. What's the median grant size from this funder?
2. How did the median grant amount change over the last three years?



6 Funder Giving History Qs to Ask

1. Can you identify at least three previously funded organizations similar to yours?
2. Is your organization's geographic location represented historically?
3. What percentage of those funded are new grantees?
4. Has the funder been giving to more new grantees over time, or more to repeat grantees?

6 Funder Giving History Qs to Ask (Cont.)

5. Does the median grant amount for new grantees align well with your project budget?
6. Does your organization's impact areas align with the funder 3-year historical giving (by NTEE codes)?

3 Internal Consideration Qs to Ask

1. Does your nonprofit have enough bandwidth to take on this application?
2. Can you meet the reporting requirements outlined by the funder?
3. Does this RFP have parts where your nonprofit can repurpose past grant proposals?

Stick until the end for a freebie workbook with these 16 questions and more...

Prospect Research Strategies

“You do not rise to the level of your goals. You fall to the level of your systems.

Your goal is your desired outcome. Your system is the collection of daily habits that will get you there.”

- James Clear, *Atomic Habits*



How to find good fit funders

Let's have everyone experience how easy it can be

Where do you find all of this information?

- The easiest way is with Instrumentl
- Alternatives:
 - Google
 - Funder Websites
 - 990 Forms through Guidestar/ IRS site
 - Other paid databases

instrumentl

Google

 PROPUBLICA

Advancing to the next level

Instrumentl Efficiency

- **Grant prospecting, tracking, and management** in one place
- **Be picky with *real* options:** 12,000+ active public & private funding opportunities
- **Assess fit quickly:** 990 data and foundation reports standardized & at your fingertips
- **Let the robots prospect:** Matching algorithm finds & regularly sends you custom good fit funders
- **Team effort:** Tasks & notes in one place lets you coordinate across your organization
- **Keep a record:** Document storage and historical views let you store key data

⚡ Our new Standard and above Plan features! ⚡



Calendar View



Salesforce Integration (pro + custom)



Application Cycles



Consultant Plan

To celebrate our launch, everyone here is getting a **personalized list of grant recommendations + 2-week free trial of the Standard Plan.**



Let's just show how easy it is

instrumentl

Quick find

Master Tracker

+ Project

PROJECTS

Air Quality

Animal Welfare

Environmental Project

Homeless and Elderly

Homeless Shelter

Mental Health

New Kennels

Refer a Friend

Document Library

Help

Account

Master Tracker

Track your opportunities across all projects

Share report

View All 184

All Statuses

Applications 143

Planned, In Progress...

Researching 41

Researching

WON

\$64,000

11 opportunities

GOAL

\$550,000

Edit

WAITING TO HEAR FROM

\$1,000

4 opportunities

LOST

\$750

2 opportunities

All

FY 2020-21, FY 2021-22

NAME

DEADLINE

November 2020

Tony Robbins Foundation Grant

Anthony Robbins Foundation (The Tony Robbins Foundation)

Senior Services

Nov 3, 2020

Samuels Foundation: Healthy Aging Grant Program

Fan Fan & Leslie R. Samuels Foundation

Senior Services

Nov 20, 2020

Post Due

Rolling deadline

Insperty Corporate Contributions

Insperty

Mental Health

Nov 20, 2020

Post Due

Rolling deadline

December 2020

RRF: Direct Service Grants

Retirement Research Foundation

Senior Services

Dec 1, 2020

Post Due

Next Deadline is Jun 15

Ford Foundation Dissertation Fellowships

Ford Foundation

Mental Health

Dec 10, 2020

Lily Auchincloss Foundation General Grants - Human Services

Lily Auchincloss Foundation, Inc.

Senior Services

Dec 15, 2020

Post Due

Next Deadline is Dec 15

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Quick find

Master Tracker

+ Project

PROJECTS

Air Quality

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Environmental Project

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Homeless Shelter

Mental Health

Refer a Friend

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Help

Account

Matches 90

Hidden from this project 3

Best Match

Filter

Search

Displaying 55 of 90 matches

NAME

DEADLINE

AMOUNT

SC Johnson Grants

SC Johnson Giving, Inc.

Rolling

Unspecified amount

Sorenson Legacy Foundation Grant

Sorenson Legacy Foundation

Sep 1

Unspecified amount

UPS Foundation Grant

UPS Foundation

Rolling

Unspecified amount

Northrop Grumman Corporation Corporate Contributions

Northrop Grumman Corporation

Rolling

Unspecified amount

Change Happens Foundation Grant

Change Happens Foundation

Rolling

Unspecified amount

Rockefeller Family Fund: Environment Grant

Rockefeller Family Fund

Rolling

Unspecified amount

Roche Corporate Donations and Philanthropy (CDP)

La Roche, Inc.

Rolling

Unspecified amount

Cornell Douglas Foundation Grants

Cornell Douglas Foundation

Rolling

US \$15,000 - US \$50,000

Mellon Foundation: Conservation

Richard King Mellon Foundation

Rolling

Unspecified amount

990 Snapshot

Based on latest 990 tax filing (2018)

View 990 Report

PAST GRANTEES IN

Massachusetts, Wisconsin, Minnesota + 1 more

MEDIAN GRANT AMOUNT

\$409,627 and \$11,183,115 total giving

FUNDER BASED IN

1525 HOWE ST, RACINE, WI 53403-2237

Overview:

SC Johnson Grants and Product Donations Help Make Our Communities Better

Write a note here

Save

Hide from this project

Create your 14-day free trial: [instrumentl.com](https://www.instrumentl.com)

Demo'ing instrumentl

instrumentl

The screenshot displays the instrumentl web application interface, which is designed for grant tracking and management. The main dashboard shows a sidebar with navigation options like 'Master Tracker', 'PROJECTS', and 'Refer a Friend'. The central area is divided into sections for 'WON' and 'LOST' grants, each with a '\$0' balance and '0 opportunities'. A 'Saved to Tracker' modal is open, showing a list of 'Other Opportunities from this Funder' and a '990 Report' section. The '990 Report' section includes a table of key statistics:

Category	Value
Past Grantees in	California, Washington, Oregon + 8 more
Median Grant Amount	\$20,000 and \$5,210,426 total giving
Funder Based In	201 4TH STREET SUITE 102, OAKLAND, CA 94607

The interface also features a 'Project' dropdown menu, a 'Notes' section, and a 'Status' dropdown menu. A 'Tasks' section is visible, allowing users to add tasks for specific grants. The bottom of the screen shows a 'Look into' button and a chat icon.

Create your 14-day free trial: instrumentl.com

Who does Instrumentl help?

- Grant writers / consultants
- Grant writing teams (associates, managers, directors)
- Development teams
- Development and Fundraising Directors
Executive Directors
- Any nonprofit looking to scale their grant strategy and efforts



How to find good fit funders

- Use your decision matrix to evaluate fit
- Consider competitiveness
- Connect with past applicants
- Contact the funder with questions
- We'll share entire trainings with our partners on this in the follow up after this workshop!

 **Let's set everyone up with good fit funders in 3 simple steps**



Visit the special link in the Zoom chat!

We'll wait a few minutes for everyone and then go over setting up your grant matches.

Start your 14 day free trial

Automate your grant search. No credit card required.

First name

Last name

Email

Password

[Show](#)

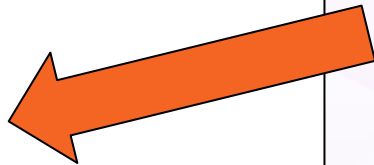
Phone number

Organization Type

☒ I'd like to receive Instrumentl product updates, including new grant announcements

NEXT

Already have an account? [Login](#)



Fill this out
once you're at
the special link.

**Click the
“NEXT” button
when ready
and then wait
for
instructions!**




If you'd like a personal walkthrough with a member of the Instrumentl team, [use this link to book a time!](#)

3 Learning Takeaways

1. Grants are a great way to **diversify your funding**
2. **Instrumentl does the heavy lifting** of finding new grants and makes tracking & management significantly easier
3. **Use Instrumentl** to turbocharge your grants system and join us for more free grant trainings!

Did you learn something new?

Get more at our upcoming workshops...

- Fundraise Awesomer! A Practical Guide to Staying Sane While Doing Good
- How to Find your Unicorn Funders & Standout Using a Power Prospectus
-  FIRESIDE CHAT: What Is - and Isn't - the Role of the Grant Writer?
- Tips from a Former Grantmaker: Live Proposal Review

RSVP at lu.ma/instrumentl/events

Following up with Celia



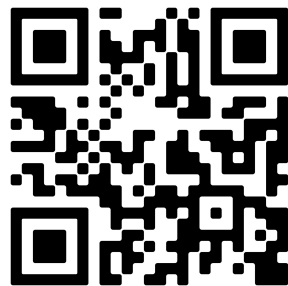
- **Email:** celia@instrumentl.com
- **Website:** www.instrumentl.com
- **Linkedin:** <https://linkedin.com/in/celia-daly/>
- **Save \$50 off your first month with the code:**
 - WORKSHOP50
- **Save two months off an annual plan:**
 - WORKSHOP2MO

We are giving everyone live a freebie!

instrumentl

To be eligible:

1. Scan the code or click the link in chat
2. Complete the actions



Enter by:

- Inviting a friend to our next event
- Completing the webinar feedback form
- Creating a 14-day Instrumentl trial



If you know another nonprofit group that could benefit from this workshop, email me at

celia@instrumentl.com

