



Advanced Grants: How to Take Your Grant Program to the Next Level

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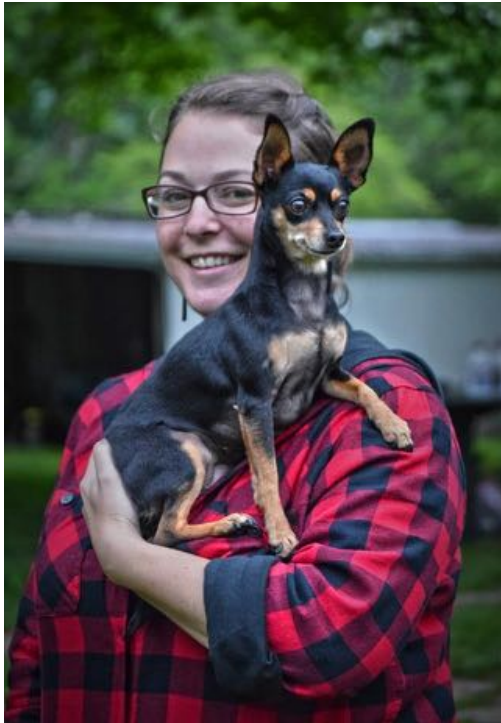
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Today's Agenda: How to

- Create real, meaningful partnerships
- Work smarter, not harder, when seeking grants
- Tackle the “sustainability” question
- Create more advanced budgets
- Get personal



Moving Past Transactions

Create real and meaningful partnerships with your foundation funders — **if they are open to it**

- Seek first to understand, then to be understood
- Take time to get to know them
- Take stewardship seriously: It's more than just reports
- 360 engagement



Relationship-Building Principles

- Test relationship hypotheses with clarifying and confirming questions
- Develop “best possible” and “minimally acceptable” outcomes for each interaction and overall relationship
- 7x7: Mix of opportunities and channels
- Walk your talk
- Keep THEIR secrets and YOUR promises
- When there is a PR/communications crisis, run TOWARD trouble



Example: 7x7 Mix

Build a grid of engagement opportunities to deepen the relationship

- Individual, small group and large group
- In-person, phone, email, other
- Purposes: thank, convey impact, referral, resource
- Natural partners: Who else can help you build this relationship?



Work Smarter, Not Harder

Your time is valuable: Use it wisely

- Stay organized: grants calendar
- Stay efficient: affinity and capacity scoring system for each partner and prospect
- Stay diligent with relationship-building BEFORE you apply
- Leverage all possible internal resources



Example: Grants Calendar

Foundation	Affinity Score	Capacity Score	Due Date	Ask Amount	Program	What Is Due
July						
ABC Foundation	High	Medium	7/1/18	-	Capital: new clinic	1 st Interim Report: narrative and detailed budget
XYZ Foundation	Medium	Medium	7/15/18	\$12,000	Capital: new clinic	Full Proposal
RST Foundation	Low	Low	Rolling	1,000	Capital	Full Proposal



Example: Affinity Scoring System

Affinity: How aligned is a foundation with your organization?

- | | |
|---|--|
| 1 | Highly aligned: They currently fund your organization. |
| 2 | Some affinity: Made successful first contact and indicated they want to learn more. Good prospect to submit a proposal to. |
| 3 | Unknown affinity: New prospect, no contact has been made. |
| 4 | Low affinity: Said they do not want to fund animal welfare and/or are not interested in learning more about your organization. |



Example: Capacity Scoring System

Capacity: What is the largest grant you could reasonably ask for?

High

Medium

Low

The definitions of high, medium or low capacity varies by organization and depends on your budget, programs and funding needs.



What Does “Sustainability” Mean?

It is NOT ONLY about:

- Showing that more than one funder is willing to invest in the program
- Programs carrying on after the first grant is spent

It is all of that, PLUS:

- Systemic change on the organizational level
- Community change
- Lasting positive impact for animals and the people who love them



Next-Level Budgeting

Budgets demonstrate your organization's savviness and are critically evaluated

- Include ALL program costs, including salary and overhead
- Show your organization's contribution to the program
- Include a budget narrative, if possible (see handout)
- Align the budget with your program descriptions and impact
- Be consistent with your accounting
- Triple-check your math



Budget Example: Show It All

Line Item	Foundation 1 (the ask)	Foundation 2 (committed)	Organization Match	Total
Salary			40,000	\$40,000
Benefits			4,800	\$4,800
Rent		10,000		\$10,000
Utilities		5,000		\$5,000
Spay/Neuter Supplies (700 animals at \$50 per surgery)		25,000	10,000	\$35,000
Transport Van	30,000			\$30,000
Fuel and Maintenance	5,000			\$5,000
Marketing			2,000	\$2,000
Total	\$35,000	\$40,000	\$56,800	\$131,800



Don't Be Afraid to Get Personal

Foundations are people too, and appreciate proposals, reports, and updates that are easy and fun to read

- Write with a warm tone and avoid jargon
- Integrate stories about the animals and people you are helping
- Incorporate the foundation staff and board members' preferences and passions
- Surprise and delight



QUESTIONS?



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**SAVE
THEM
ALL**