

EVENT | Grantmaking 201

DATE | July 10-11, 2019

FIND ONLINE | www.inphilanthropy.org/resources/grantmaking201

SECTION: PEOPLE

TOPIC	RESOURCE NAME	URL	ABOUT
Capacity	Executive Summary of IPA Capacity Building Landscape Scan	https://www.inphilanthropy.org/sites/default/files/resources/IPA%20Capacity%20Landscape%20Scan.pdf	Provides you an overview of how Indiana foundations are strengthening nonprofits.
	Essential Skills and Strategies Capacity slides	https://www.inphilanthropy.org/sites/default/files/resources/ESS%20Module.Capacity%20Building.pdf	Slides from a national grantmaking curriculum to help you determine your capacity building style.
	National Council of Nonprofits	https://www.councilofnonprofits.org/tools-resources/what-capacity-building	Their capacity webpage provides excellent information to help you define your capacity building strategies.
	Standards for Excellence Institute®	http://standardsforexcellence.org/about-the-institute/	The Standards for Excellence Institute® is a national initiative established to promote the highest standards of excellence and help nonprofit organizations meet these high benchmarks.
	Grantmakers for Effective Organizations (GEO): Capacity Building web page	https://www.geofunders.org/what-we-care-about/capacity-building	Their capacity webpage, resources, and research will help you define your capacity building strategies.
	Nonprofit AF	http://nonprofitaf.com/ https://nonprofitaf.com/2018/02/answers-on-grant-proposals-if-nonprofits-were-brutally-honest-with-funders/ https://nonprofitaf.com/2018/07/answers-on-grant-proposals-if-nonprofits-were-brutally-honest-part-2/ https://nonprofitaf.com/2019/07/answers-on-grant-proposals-if-nonprofits-were-brutally-honest-part-3/	<p>A hilarious blog with insight on the grantee/grantor relationship. Formally, <i>Nonprofit with Balls</i>.</p> <p>Features a three-part blog, <i>Answers on grant proposals if nonprofits were brutally honest with funders</i>.</p>

Generational Communication	Generational Differences Chart	https://www.inphilanthropy.org/sites/default/files/resources/Generational%20Differences%20Chart.pdf	PDF of generational differences to help you develop an intergenerational communication style.
	Face to Face Communications	https://www.inphilanthropy.org/sites/default/files/resources/Face%20to%20Face%20Communication%20vs%20Other%20Types%20of%20Communication.pdf	Will help you understand face-to-face communications.
	Storytelling for Good: Communications Toolkit	https://www.inphilanthropy.org/resources/storytelling-good-communications-toolkit	An online tool aimed to support nonprofits and foundations in telling better stories.
	Effective and Fun Board Meeting Resources	https://www.inphilanthropy.org/sites/default/files/resources/Effective%20and%20Fun%20Board%20Meetings%20Resource%20and%20Idea%20Worksheet.pdf	A list of resources and ideas to make your meetings more effective and fun!
	Facilitation Tools of the Trade	https://www.inphilanthropy.org/sites/default/files/resources/Facilitation%20Tools%20of%20the%20Trade%20-%20Exponent%20Philanthropy.pdf	A resource from Exponent Philanthropy with action-items, tips, and reminders to improve your facilitation.
Diversity, Equity, Inclusion	Council on Foundations	https://www.cof.org/topic/diversity-equity-inclusion	Research and best practices to help you understand and take action to support diversity, equity, and inclusion.
	D ₅ Coalition	http://www.d5coalition.org/	An excellent resource for understanding issues on diversity, equity, and inclusion.
	Putting Racism on the Table	https://www.puttingracismonthetable.org/	Videos and information for boards and grantmakers addressing structural racism and implicit bias in grantmaking.
	NCRP Power Moves Guide	https://www.ncrp.org/initiatives/philamplify/power-moves-philanthropy/inside-the-guide	An assessment tool for leveraging power on equity and justice.
	Fund the People	http://fundthepeople.org/	New research and resources to invest in equity in the nonprofit workforce.

SECTION: PRACTICE

TOPIC	RESOURCE NAME	URL	ABOUT
Accepting Proposals	101 Recap: Grantseeker's Bill of Rights	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Grantseeker%27s%20Bill%20of%20Rights%20%281%29.pdf	Tips on incorporating grantee rights into your grantmaking practices.
	101 Recap: Grant Guidelines	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Grant%20Guidelines.pdf	Tips for developing your guidelines.
	101 Recap: Proposal Acceptance Practices	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Proposal%20Acceptance%20Practices.pdf	Tips for developing your proposal acceptance procedures.
	Grantseeker Resource: How to Dig Deeper	https://communitypartners.org/community-partners-resources/how-dig-deeper-when-talking-funder	A resource you can pass along to your grantseekers to help them understand grant processes.
	Principals for Peak Grantmaking	https://www.peakgrantmaking.org/improve-your-grantmaking/implement-better-practices/	PEAK Grantmaking's principals for improving grantmaking.
	CFMD Online Software Recommendation	https://www.inphilanthropy.org/sites/default/files/resources/2016%20IDEALWAR%20E_Grants%20Management.pdf	An example to help you make software recommendations.
	Consumers Guide to Grants Management Systems	https://www.inphilanthropy.org/sites/default/files/resources/Consumers%20Guide%20to%20Grants%20Management%20Systems_JUNE182017.pdf	Resource for software selection processes.
	CFMD Guidelines and Quote Policy	https://www.inphilanthropy.org/sites/default/files/resources/Quarterly%20Competitive%20Grant%20Quote%20Guidelines.pdf https://www.inphilanthropy.org/sites/default/files/resources/Quarterly%20Competitive%20Grant%20Guidelines%20Revised%202017%20Board%20Approved.pdf	Community Foundation of Muncie and Delaware County
Reviewing Proposals	101 Recap: 990s	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20990s.pdf	Information on what you can find within a grantseekers' 990.

101 Review: Initial & Full Review	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Initial%20%26%20Full%20Review.pdf	Tips for initial and full review of proposals.
101 Recap: Site Visits	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Site%20Visits.pdf	Tips for conducting site visits.
101 Recap: Due Diligence	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Due%20Diligence.pdf	Tips for due diligence.
Sample Grant Matrices	https://www.inphilanthropy.org/sites/default/files/resources/SAMPLE%20GRANT%20MATRIX%20-%20Boone%20County.xlsx -- (Visit Resource Page to Download) https://www.inphilanthropy.org/sites/default/files/resources/SAMPLE%20GRANT%20MATRIX%20-%20Warren%20County.pdf	Two sample matrices for you to consider.
Due Diligence: Check List of Accountability	https://www.inphilanthropy.org/sites/default/files/resources/Due%20Diligence%20Check%20List%20of%20Accountability.pdf	CFMDC check list
Project Streamline: Due Diligence Guide	https://www.inphilanthropy.org/sites/default/files/resources/Project%20Streamline%20Due%20Diligence%20Guide.pdf	Resource for developing your due diligence processes
Sample Financial Statements	https://www.inphilanthropy.org/sites/default/files/resources/Sample%20Financial%20Documents%202018%20SOPF%20and%20SOA.pdf	Sample statements for review/practice
GEO listserv: Financial Assessment in Due Diligence	https://www.geofunders.org/resources/geolist-summary-financial-assessment-in-due-diligence-phase-of-grant-review-933	Great discussion on financial review practices
CFMDC: Process for New Applicants	https://www.inphilanthropy.org/sites/default/files/resources/Process%20for%20New%20Applicant%20and%20New%20Grantee.pdf	Helpful guidelines for reviewing proposals from new applicants

Making Funding Decisions	101 Recap: Faces of Philanthropy	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%207%20Faces%20of%20Philanthropy.pdf	Ways for you understand how your committee thinks and makes decisions
	101 Recap: Funding Recommendations	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Making%20Funding%20Decisions.pdf	Tips for helping your committee make effective grant decisions
	101 Recap: Yes/No	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Saying%20Yes%20or%20No.pdf	Tips on saying “yes” and saying “no”
	2019 Community Impact Funding Initiative Grant Guidelines and FAQs	https://www.inphilanthropy.org/sites/default/files/resources/SAMPLE%20GRANT%20GUIDELINES%20-%20Community%20Foundation%20of%20Bloomington%20and%20Monroe%20County.pdf	Community Foundation of Bloomington and Monroe County
Managing the Grant	101 Recap: Expenditure Responsibilities	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Expenditure%20Responsibility.pdf	Tips on determining expenditure responsibility
	101 Recap: Grant Agreements	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Grant%20Agreements.pdf	Tips on what should be in your grant agreements
	101 Recap: Intervention Strategies	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Monitoring%20and%20Intervention%20Strategies.pdf	Tips on developing intervention strategies for grants
	COF Expenditure Responsibility Chart	https://www.inphilanthropy.org/sites/default/files/resources/Expenditure%20Responsibility%20Chart%20COF.pdf	Chart to determine if expenditure responsibility is needed
	Variance Request Decision Chart	https://www.inphilanthropy.org/sites/default/files/resources/Variance%20Request%20Decision%20Chart.pdf	Flow chart to assist with handling variance requests
	Grant Agreement	https://www.inphilanthropy.org/sites/default/files/resources/Grant%20Agreement%20EXECUTED%20-%20BCGC.pdf	Community Foundation of Bloomington and Monroe County
Measuring & Communicating Success	101 Recap: Evaluation	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Evaluation.pdf	Tips to evaluate grants

	101 Recap: Grant Reporting	https://www.inphilanthropy.org/sites/default/files/resources/101%20Recap%20-%20Grant%20Reporting.pdf	Tips on reporting practices
	Developing Effective Communications Deep Dive Day Resources	https://www.inphilanthropy.org/resources/developing-effective-communications-deep-dive	Presentations and handouts from IPA communications workshop.
	Grant Closing Presentation	https://www.inphilanthropy.org/sites/default/files/resources/Grant%20Close%20Out%20and%20Retention%20Presentation.pdf	What you need to know about effective and compliant grant closing processes
	Post Grant Reports and Monitoring Presentation	https://www.inphilanthropy.org/sites/default/files/resources/Post-Grant%20Reports%20Monitoring.pdf	Ball Brothers Foundation presentation on tips for your reporting and monitoring practices
	Evaluation Models	https://www.inphilanthropy.org/sites/default/files/resources/Types%20of%20Evaluation.pdf	Overview of evaluation models you can use to measure grant success
Helpful Books	<i>Decisive</i> by Chip Heath	https://www.amazon.com/Decisive-Make-Better-Choices-Life/dp/0307956393/ref=sr_1_1?keywords=Decisive&qid=1562116876&s=gate&sr=8-1	Excellent overview on the decision making process to help you make the best grant decisions possible.

SECTION: PURPOSE

TOPIC	RESOURCE NAME	URL	ABOUT
Advocacy	Alliance for Justice/IPA Webinars	<p>Investing in Change: Support for Advocacy Webinar Part I https://www.inphilanthropy.org/resources/advocacy-part-1</p> <p>Investing in Change: Support for Advocacy Webinar Part II https://www.inphilanthropy.org/resources/advocacy-webinar-part-2</p>	Two webinars to help you understand what you can and cannot do as a grantmaker to influence policy.
	Bolder Advocacy	https://www.afj.org/our-work/issues/bolder-advocacy	<p>Alliance for Justice's Bolder Advocacy Initiative is the go-to source for advocacy information. They can help you understand:</p> <ul style="list-style-type: none"> • Worry-Free Lobbying for Nonprofits: How to Use the 501(h) Election to Maximize Effectiveness • Maximize Your Lobbying Limit: Elect to Measure Your Lobbying Using the 501(h) Expenditure Test • Keeping Track: A Guide to Recordkeeping for Advocacy Charities
	IPA	https://www.inphilanthropy.org/advocacy	IPA has resources, events (Legislative Lunches, Foundations on the Hill, Day at the Statehouse), and programs to assist your policy efforts.
	Census	https://www.inphilanthropy.org/Census2020	This resource will help you understand how the Census impacts Indiana policy and federal funding.

Impact Investing	Resources for Impact Investing	https://www.inphilanthropy.org/sites/default/files/resources/Resources%20for%20Impact%20Investing.pdf	This curated list of resources will help with your impact investing decisions.
	Sonen Graphic	https://www.inphilanthropy.org/sites/default/files/resources/Sonen%20Impact%20Investing%20Graphic.pdf	This visual will help you understand the Impact Investing spectrum.
	Update on PRIs	http://www.denverpost.com/2016/06/12/on-philanthropy-new-irs-regulations-encourage-use-of-program-related-investments/	
Preparing for the Future	What's Next for Community Philanthropy	http://monitorinstitute.com/communityphilanthropy/	Monitor Institutes' initiative to provide organizations with helpful tools.
	11 Trends in Philanthropy for 2019	https://johnsoncenter.org/11-trends-for-2019/	Johnson Center at Grand Valley State University
	Learning with PEAK Grantmaking	https://learning.peakgrantmaking.org/	Relevant learning opportunities and resources.
	Deal Breakers/Deal Makers	https://www.seewhatimean.com/swim-products/deal-breaker-game-and-guide-starter-kit	This unique game helps funders explore interpersonal and systemic dynamics.
Strategic Grantmaking	Identifying Gaps	https://www.inphilanthropy.org/sites/default/files/resources/Identifying%20Gaps%20and%20Leverage%20Points%20for%20Change%20%20GrantCraft.pdf	Blog post on conducting scans to identify opportunities for strategic initiatives.
	Questions to Ask	https://www.inphilanthropy.org/sites/default/files/resources/Questions%20for%20Initiatives.pdf	Questions to ask to identify opportunities for strategic impact.
	Resources for Strategic Grantmaking	https://www.inphilanthropy.org/sites/default/files/resources/Resources%20for%20Strategic%20Philanthropy.pdf	A curated list of resources to help with your strategic grantmaking decisions.
	Strategic Grantmaking Approaches	https://www.inphilanthropy.org/sites/default/files/resources/Strategic%20Philanthropy%20Approaches.jpg	Graphic on roles funders can take in strategic grantmaking.
	Strategic grantmaking guidelines, assessment tool, and talking points	https://www.inphilanthropy.org/sites/default/files/resources/CFMDC%20--%20Strategic%20Grantmaking%20Assessment%20Tool%20-%20Procedures%20-%20Talking%20Points.pdf	The Community Foundation of Muncie and Delaware County, Inc.