

How Do I...

Manage Grants in TCM?

Problem

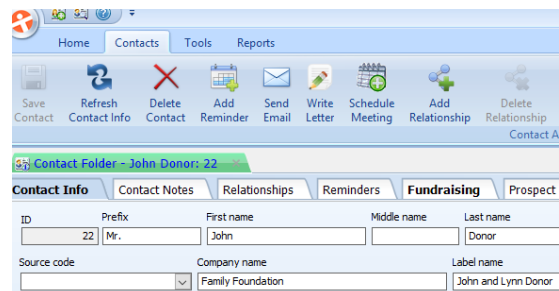
I need to manage multiple grants with different deadlines, etc and I don't want to use an additional software product or Excel to manage them.

Solution

By using the Moves Management Tool within the Fundraising Manager, you can achieve this.

Process

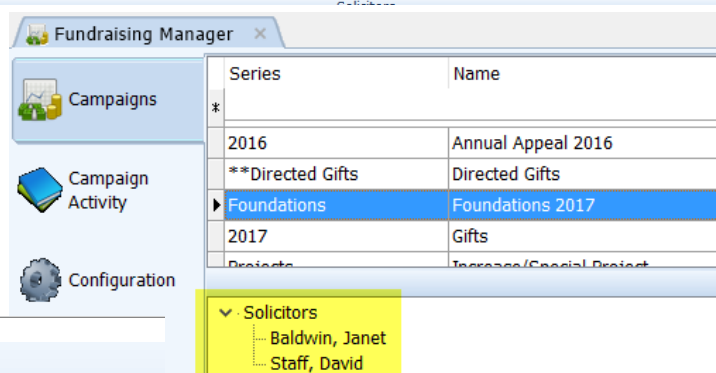
1. Create a contact for the Foundation to which you are applying.
SUGGESTION: Enter the Foundation name in the company name and your contact in the first and last name fields.



2. In the Fundraising Manager, create a Series and Campaign for the Foundations you are applying to. Annual goals, application amount, and received amounts can all be tracked with the campaign as well.

Series	Name	Campaign year	Start date	End date	Goal	Pledged	Paid
**Directed Gifts	Directed Gifts				\$0.00	\$33,050.00	\$33,050.00
Foundations	Foundations 2017				\$250,000.00	\$0.00	\$0.00
2017	Gifts				\$0.00	\$0.00	\$0.00
Projects	Increase/Special Project				\$500,000.00	\$60,500.00	\$0.00

3. Identify the staff or volunteers who will be working on the grants and add them to the solicitor box.
4. Create a "Pledged Gift" for the application amount.



Add a New Donor to this Campaign

This is a Paid gift Pledged gift

Donor Name: John Donor

Pledged amount: \$10,000.00 Pledged date: 1/5/2017

Fundraising Manager

Campaign: Foundations 2017

Donor	Funder name	Foundation	Opening	Closing	Pledged	Paid	Category	Level	Solicitor	Thank you sent
Donor, John	Family Foundation	<input type="checkbox"/>	\$0.00	\$0.00	\$10,000.00	\$0.00			Staff, David	

Donor Details Moves

Order	Status	Move	Description	Date Assigned	Date Due	Date Complete	Status Notes	Outcome
*								

Click here to add a new move

- Change the *Funder Name* to the Foundation.
- Set the *Solicitor* to the lead staff or volunteer working on the grant request.
- Select the "Moves" Tab.
- Begin entering projects needed for the grant application. Click the * to add others to the project, however they must have a contact in TCM.
- As the project evolves, you can:
 - Edit the projects and dates,
 - Keep extensive notes about the task,
 - Add outcomes when you know them.

Donor Details Moves

Order	Status	Move	Description
1	Completed	Send Letter of intent	
*			
		Staff, David	
2	Assigned	Develop Full Budget	
8	Completed	Prepare Budget	

Donor Details Moves

Order	Status	Move	Description	Date Assigned	Date Due
2	Assigned	Develop Full Budget		2/28/2017	

General Status Notes Outcome

Order: 2 Status: Assigned Move: Develop Full Budget

Description: Meet with Accounting office
Get pricing of materials.
Project staff costs

Date Due: 3/30/2017 Date Assigned: 2/28/2017 Date Complete: 2/12/20

9 In Progress Submit Final Proposal

General Status Notes Outcome

Funded

- Once the grant is funded and the payment is received, fill in the Donor payment tab.

Fundraising Manager

Campaign: Foundations 2017

Donor	Funder name	Foundation	Opening	Closing	Pledged	Paid	Category	Level	Solicitor	Thank you sent
Donor, John	Family Foundation	<input type="checkbox"/>	\$0.00	\$0.00	\$10,000.00	\$10,000.00			Staff, David	

- The Foundation Cover sheet will now show the goal amount, application amount, and the actual amount received.

Fundraising Manager

Series	Name	Campaign year	Start date	End date	Goal	Pledged	Paid
**Directed Gifts	Directed Gifts				\$0.00	\$33,050.00	\$33,050.00
Foundations	Foundations 2017				\$250,000.00	\$10,000.00	\$10,000.00
2017	Gifts				\$0.00	\$0.00	\$0.00

- The report, *MM 3 - Moves Management Foundation 20170612* (found in the TCM Report Library), will allow you to track the tasks and progress of each grant.

 GRANT MANAGEMENT

Foundation: Family Foundation Foundations 2017 Family Foundation

PROJECT	DUE DATE	STAFF	TASKS	OUTCOME
Send Letter of Intent	02/15/2017	David Staff		Completed
Develop Full Budget	03/30/2017	David Staff	Meet with Accounting office Get pricing of materials. Project staff costs	Assigned
Prepare Initial Budget	02/01/2017	David Staff		Completed
Submit Final Proposal	06/01/2017	David Staff		In Progress

