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

last name fields.

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

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Save	Refresh	Delete	Add	Send	Write	Schedule	Add	Delete
Contact	t Contact Info	Contact	Reminder	Email	Letter	Meeting	Relationship	Relationship
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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.

/ 딇 Fundraising Man	ager ×										
	Series	Name	Campaign year	Start date	End date	Goal	Pledged	Paid			
Campaigns	*	Click here to add a new campaign									
	**Directed Gifts	Directed Gifts				\$0.00	\$33,050.00	\$33,050.00			
Campaign	Foundations	Foundations 2017				\$250,000.00	\$0.00	\$0.00			
Activity	2017	Gifts				\$0.00	\$0.00	\$0.00			
	Projects	Increase/Special Project				\$500,000.00	\$60,500.00	\$0.00			
(A)	Drojecto	Ongoing Projecto				¢0.00	#10 000 00	#6 E00 00			

/ 🚜 Fundraising Manager

- 3. Identify the staff or volunteers who will k add
- 4. Crea appli

l be working on the grants and	Campaigns	*	Series	Name
them to the solicitor box.		_	2016	Annual Appeal 2016
	Campaign		**Directed Gifts	Directed Gifts
aste a "Pledged Gift" for the	Activity	Þ	Foundations	Foundations 2017
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blication amount.	Configuration		Drojosta	Increace/Createl Draiget
ew Donor to this Campaign	Entr'		 Solicitors Baldwin, Janet 	
This is a Pledged gift Pledged gift			Staff, David	
	2			
Donor Name John Donor	Advanced Search			
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Add a New

Total Community Manager Knowledge Base

/ 딇 Fundraising Man	ager ×												
Compolant	Campaign:	ampaign: Foundations 2017											
Campaigns	Donor	Funder name	Foundation	Opening	Closing	Pledged	Paid	Category	Level	Solicitor	Thank you sent		
	I Donor, John	Family Foundation		\$0.00	\$0.00	\$10,000.00	\$0.00			Staff, David			
Campaign Activity													
~	Donor Details	Moves											
Configuration	Order 🛆 S	tatus Move		🛆 Descri	ption	Date Ass	igned Date D	Due 💧 Date Com	plete Sta	atus Notes	Outcome		
Cont.						Click here to	add a now mor	10					

- 5. Change the *Funder Name* to the Foundation.
- 6. Set the *Solicitor* to the lead staff or volunteer working on the grant request.
- 7. Select the "Moves" Tab.

or Details Moves

- Begin entering projects needed for the grant application. Click the * to add others to the project, however they must have a contact in TCM.
- 9. As the project evolves, you can:
 - a. Edit the projects and dates,
 - b. Keep extensive notes about the task,
 - c. Add outcomes when you know them.

1	Dor	nor Detail	s Moves		
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	÷	2	Assigned	Develop Full Budget	
	÷	8	Completed	Prepare Budget	

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				Click her	e to add a										
	2 Assigned	Develop Full Budget		or Details Mo	ves										
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	Description			General	tatus Notes Out	come									Click here to a
			[= /= /= /=]	Meet wit	h Accounting offic	e				9 In Progress	Submit Ei	nal Pronosal			2/
	Date Due 3/30	Date Assigned	2/28/2017 Date Complete	2/12/20 Get prici	ng of materials.										
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1	LU. Ond	ce the gra	ant is	Converting	Campaign	: Foundations	2017								
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	fun	ded and t	the		Donor, John	Family Foundatio	n 🗌	\$0.00		\$0.00 \$10,000.00	\$10,000.00			Staff, David	
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fill in the Donor payment tab

 The Foundation Cover sheet will now show the goal amount, application amount,

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		Series	Name	Campaign year	Start date	End date	Goal	Pledged	Paid	
Campaigns	*			Click here to add	a new campa	ign				
_	ŀ	**Directed Gifts	Directed Gifts				\$0.00	\$33,050.00		\$33,050.00
Campaign	Þ	Foundations	Foundations 2017				\$250,000.00	\$10,000.00		\$10,000.00
Activity		2017	Gifts				\$0.00	\$0.00		\$0.00

and the actual amount received.

12. 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 Fo	oundation Foundat	tions 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

