



Best Practices: Grant Tracking

Use DonorSnap to track Foundations and Grants! Here are some *Best Practices* for tracking grants; of course you are not limited to examples provided here.

Foundations & Grants

Contacts: Include Foundations and Government agencies as Contacts in your database, using the **Contact Type** to separate them from Individuals and Businesses. Customize the Contact Type under **Maintenance > Site-Setup > DonorSnap Site Lookups**

Donations: Track incoming Grants via the Donation tab; ie. enter a Grant check from ABC Foundation just as you would enter a donation check from Bob Smith. Use the **DonationType** field to indicate that the payment is a Grant, versus a Donation or Event ticket. Customize the Donation Type under **Maintenance > Site-Setup > DonorSnap Site Lookups**

Run a **Reports > Donation Activity > Donations Received** report for all Grants received, or all Grants within a specific time period.

Ticklers (reminders)

Use the **Tickler** system to set up reminders for the future about your Grants.

- Follow-ups with contacts at the foundation
- Application due-dates
- Report due-dates

Ticklers live on the **Dashboard** (the home page of DonorSnap). These can be assigned to an individual user; you can customize who can see which ticklers on the Dashboard. To customize the list of those who can be assigned ticklers: **Community > Other Community Members**

Once you have completed a tickler, edit the tickler and CHECK the **Completed** box. This will save the tickler in your system, but remove the alert from the Dashboard.

Ticklers can email the person assigned if the completed box is not checked after the due date. For example, set a tickler to follow-up with ABC Foundation on February 1st. If you have not checked the Completed box, the tickler will email you on February 2nd, reminding you that you have an outstanding tickler in DonorSnap.



Interactions

Record **Interactions** of your communications

- Phone calls/Emails with contacts at the foundation
- Mailings sent (Sent Pg 2 on X date; Sent Volunteer Activity report on Y date)
- Record information about Grant applications:
 - Applied for X Grant on Y date
 - Application for Z grant was denied & reason

Additional notes:

Some organizations pay out Grants. DonorSnap is not built to track expenses or pay-outs, however you could customize this **Interaction** tab in this way.

For example, using your contact, Jenny Smith, track Interactions for grants that she applied for, awards she received, additional communications between Jenny and your organization about her grant applications, etc.