

4E. Development: The Perfect Match: Identifying Foundation Prospects

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Handouts:

1. DeLauri PowerPoint Slides
2. Example forms and worksheets



The Perfect Match:
**Strategies and Tools to Identify, Evaluate, and Build Relationships
with Foundation Prospects**

Linda DeLauri, Ed.M.
2011 CAPLAW National Training Conference
Minneapolis, MN
June 16, 2011

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Overview



The top reasons funders reject proposals are that requests fall outside of a foundation's interest areas and proposals fail to follow guidelines. Learn how to avoid these common pitfalls and be more efficient and effective in seeking foundation grants. Proposal competitiveness and success often rests on the degree of funder-project match. A well-devised strategic approach lessens staff burnout, improves funder relations, and avoids wasting time and resources on non-competitive proposals. In this session, participants will learn to identify a solid pool of potential funders; fully understand and respond to funder program priorities and procedures; and go beyond the foundation mission statement to assess and capitalize on the degree of match between the funder and project.

In Today's Session

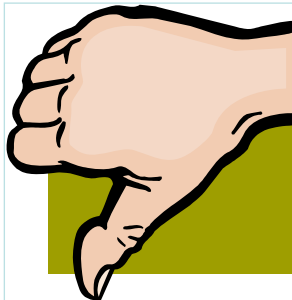
- Why Do Prospect Research?
- Five Basic Rules
- Three Basic Tools
- Casting A Net Wide
- Ending With A Good Fit
- Turning Research into Relationships

Why Do Prospect Research?

Most common responses: **We do prospect research to:**

- Broaden base of support
- New projects need new funders
- Replace old funders
- Get as many proposals out the door as possible
- **Identify a pool of viable prospective funders**
- **Fully understand funder program priorities and procedures**
- **Assess degree of match between the funder and a project**
- **Understand how to prepare a competitive proposal**
- **Increase overall success rate**

Superficial Prospect Research...

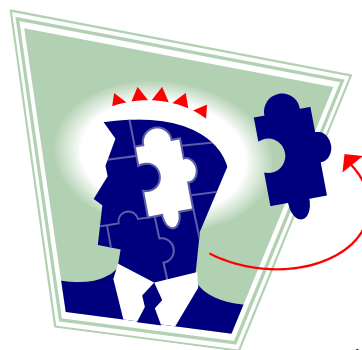


- Top reasons cited by funders for “rejecting” proposals:
 - Request falls outside of the funder program area.
 - Proposal did not follow the funder guidelines.

- **Inappropriate requests and/or ill prepared proposals:**
 - **Reflect poorly on your organization.**
 - **Turn off potential funders.**

Prospect Research Reality Check

- Prospect Research:
 - Labor intensive
 - Time consuming
 - At times confusing
 - Often contradictory
 - Requires critical thinking



Five Basic Rules

1. Let your mission or project guide your research.
 - Goals and objectives
 - Beneficiaries, stakeholders
 - Potential impact on field, issue, community, population
 - Fundable elements

2. Develop a search strategy
 - **National Taxonomy of Tax Exempt Organizations**
 - 26 major fields, 3 level hierarchy
 - Informs Foundation Center Grant Classification
 - **Types of Support** (Foundation Center)
 - **Key words, concepts**

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Five Basic Rules (cont.)

3. Devise a *uniform* record keeping system before you start.
 - Commercial databases (e.g., DonorPerfect, Raiser's Edge)
 - Initial research log - Excel spreadsheet/Word table
 - In-depth research reports

4. Determine formula to set priorities for action.
 - Internal ranking systems help assess which funders are worth a closer look...and a proposal..

5. Start by casting a wide net; end with a good fit.

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How Do I Parse My Project?

Rule 1

- Know you are and what you are doing.
 - Well-defined problem or unmet need
 - A **theory of change**
 - Beneficiaries and other stakeholders
 - Overarching goal(s)
 - Measurable objectives, performance indicators
- Consider multiple approaches.
- Don't box yourself in.
- Consider components.



What's My Strategy?

Rule 2

- Geo terms – neighborhood, city/town, county, state, region
- Population – direct beneficiaries and other stakeholders
- Field (NTEE Codes)
- Problem(s) – direct and indirect
- Solution(s)
- Grant classifications (including Type of Support)



TIP

Collect search terms and concepts as you go!

How Do I Track And Assess Prospects?

Rules 3&4



Three Steps:

- Casting the net wide
 - Develop the pool
 - Volunteers, interns
- Screening/Ranking
 - Set Priorities
 - Junior staff
- Taking a Closer Look
 - Conduct in-depth analysis
 - Begin to flesh out approach strategy
 - A seasoned eye

Tracking Research

Prospect	Program Interests	Geo Focus	Population Focus (if appl)	Grant Range (Typical Grant)	Types of Support	Exclusions (Does NOT Fund)	Initial Contact	Deadlines	Decision Timeline	Potential Contacts	Comments/Strategies	Initial Assessment	Website
Clipper Ship Fdn.	Human Services	Greater Boston (cities and towns lying on or within Route 128); Lawrence, Brockton, Chelsea, Brockton & Lawrence = High Priority	Low-income Populations with priority to homeless/underhoused, immigrants, disabled, and those "in need." Categorizes grants under 1) Children & Youth 2) Persons with Disabilities 3) Community Affairs 4) Food & Shelter 4) Emergency/Disaster Relief	\$5,000 to \$25,000 (In AR - most grants \$10K, \$7.5K or \$5K)	Program /Operating	Advocacy, Religion, Higher Ed, Hospitals, Film, Books, Conferences, Research/Scholarships/Fellowships, Campaign Funding	Full Proposal in AGM Format	FOR 2010 February 12, May 7, August 13 and November 5	January, April, June, and October.	[Does someone on your board know someone on Clipper Ship board?]	For 2006-2008 nearly 1/2 grants directed to children and youth.	[Research Further Or Not A Prospect]	http://www.

Setting Priorities

CharityVillage Campus

Grant seeking Course

Prospect Screening Worksheet

Rank the fit of potential funders from 1 (low) to 5 (high) for each of the green highlighted boxes below.
Add these across for the Total Fit score.
If a prospect's Total Fit score is 15 or more, use the Prospect Tracking Worksheet to collect more information about the prospect.

Funder Name	Contact Method	Geographic Focus	Funding Interests	Grant Types	Grant Sizes	Total Fit Score	Next Steps
Example: Bigtown Foundation	www.bigtown.org	4	3	5	5	17	Fill in Prospect Tracking Worksheet
Example: ABC Corp.	416-555-1212	3	4	3	2	12	Contact in a year for updated info

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Page 1 of 1

Charity Village Grantseeking Course / "Free sample resource (PDF): Prospect Screening Worksheet" Available at: http://www.charityvillage.com/cv/learn/PDFs/prospect_ranking.pdf 13

Taking A Closer Look

Foundation Center Prospect Worksheet (Modified). Available at: <http://foundationcenter.org/findfunders/wrksheet/>

Date Research Completed _____

Foundation Basic Information

Name _____

Address _____

Contact Person _____

Website URL _____

Summary of the foundation's mission and the specific grantmaking initiative best suited to project.

Financial Data

Total Assets _____

Total Grants Paid _____

Grant Ranges/Typical Grant _____

Period of Funding/Project _____

Is Funder a Good Match?

	Funder	Your Organization/Project
Subject Focus (list in order of importance)	1. _____ 2. _____ 3. _____	1. _____ 2. _____ 3. _____

Geographic Limits _____

Type(s) of Support	Funder	Your Organization/Project
	1. _____ 2. _____ 3. _____	1. _____ 2. _____ 3. _____

Population(s) Served _____

Type(s) of Recipients, *including representative grants* _____

Application Information

Does the funder have printed guidelines and/or application forms? _____

Preferred Initial Approach (letter of inquiry, formal proposal) _____

Deadlines _____

Board Meeting Date(s) _____

Sources of Above Information

990-PF -- Year: _____ Reviewed

Annual Report -- Year: _____ Reviewed

Foundation Center Director Online or other directories/grant indexes (specify) _____

Grantmaker Web site / Grantmaker communication (summarize) _____

Other (specify, e.g. Funder Guidelines included in Form 990 Funders online grant database) _____

Notes (Provide an assessment of the prospect's match to your project.)

Proposed Request (Specify and justify amount of request and type of support requested.)

Modify the Foundation Center Prospect Worksheet to meet your needs, or design your own report.

Foundation Center – Finding Funders Prospect Worksheet <http://foundationcenter.org/findfunders/wrksheet/> 14

Questions, Answers & Challenges



Cast a Wide Net> *The Starting Points*

Rule 5

- [Foundation Center](#) (Free Search)
 - Wide range of print / CD directories
 - GrantSpace
- [The Grantsmanship Center](#)
 - Local – state agencies, corporate funders, community foundations by state
 - Federal and state
- [Council on Foundations Affinity Group Network](#)
 - Foundations self-identify
- [Fundsnet Services](#)
 - Ad hoc

Cast a Wide Net> *Subscribe & Search*

- [Foundation Center Directory Online](#)
 - Best value - monthly rates
- [GrantStation](#)
 - Free with Grant Professionals Association Membership
- [Chronicle of Philanthropy Guide to Grants](#)
 - Awarded grants



TIP

Do not rely on subscription database search alone! Data may not be most up to date and coding has a subjective element.

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Cast a Wide Net> *Let Info Come to You*

Sign up for e-newsletters, listservs, and customizable alerts!



- [Foundation Center Philanthropy News Digest](#) and [RFP Bulletin](#) [free]
- [Nonprofit World Funding Alert](#) [fee]
- Many congressional, municipal offices offer compilation alerts.

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Cast a Wide Net> *Let Info Come to You*

- Seek out Special Interest Compilers, e.g.,
 - [Center for Health and Health Care in Schools](#)
 - [Virtual Cap](#) (community action)
 - [Praxis Project](#) (community organizing)
 - [Resist](#) (social justice)
 - [Juvenile Justice Information Exchange](#)



Scan alerts as they arrive and file prospects in a “prospect” folder or project-specific subfolders in your Outlook/other email program.

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Cast a Wide Net> *Print & Periodicals*

- [Chronicle of Philanthropy](#)
- [Philanthropy Journal](#)
- [Grassroots Fundraising Journal](#)
- University and public libraries and [regional grantmaker associations](#)
 - Foundation Center [Cooperating Collections](#)
 - [Michigan State University](#)
 - Local—Business Journals [Annual Book of Lists](#)

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Cast a Wide Net > *Explore the Field*

- Talk to your nonprofit colleagues to learn who is funding similar organizations and projects.
- Investigate nonprofits with similar missions, target populations, etc.
 - [Guidestar](#) 990s [fee]
 - Check local library for full access
- THINK: **colleagues** and potential **collaborators** rather than competitors.



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Go To The Source > *Funder Websites*

- Funder Guidelines
 - Who, Where, When, What, How, and How much
 - Don't overlook:
 - **What we don't fund**
 - Frequently asked questions
 - Letter from Director
- Funder Annual Reports/Grant Databases
 - The **reality** of a funder's grantmaking
 - Recognize outlier grants
- Publications, Knowledge Centers
 - Funder's **approach** to issue
 - Funder/Field language
 - Field Players

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Go To The Source> *Guidelines/Websites*

Questions to Ask

- 1) What types of organizations does the funder support?
- 2) Does the funder accept unsolicited proposals? If no, is there a letter of inquiry process?
- 3) Why type of services or programs does the funder support?
- 4) Does the funder make grants in your geographic area?
- 5) What is the funder's *typical* grant size?
- 6) Does the funder prohibit certain types of grants?

Source: Adapted from The Foundation Center.

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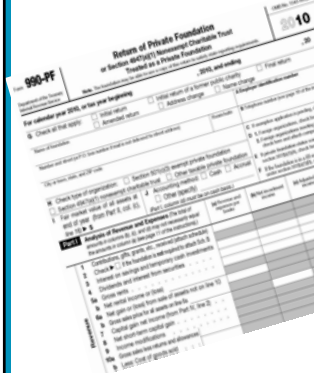
Go To The Source> *Guidelines/Websites*

Questions to Ask (cont.)

- 7) Does the funder make grants to cover full project costs?
- 8) What types of organizations does the funder tend to support?
- 9) Are there specific application deadlines and procedures?
- 10) Does the funder require specific forms or certifications, (e.g. letter of endorsement from the president of your board, superintendent of a local school district, IRB approval)?

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Go To The Source > Form 990/990-PFs



- Foundation growth (Part I, line 1)
- Total grants paid (Part 1, line 25)
- Giving trends +/- (Part V, 1)
- New funding focus (Part VII-A, 2)
- Board, staff, consultant contacts (Part VIII)
- Activities besides grantmaking (Part IX-A)
- Program related investments (Part IX-B)
- Details of grantmaking process (Part XV)
- A Private Operating Foundation (Part XIV)
- Spending Forecast (Part XIII)
 - 2 a and 2b > increase likely
 - 3F < decrease likely



TIP

Foundation 990-PFs often include unpublished telephone #s and a copy of traditional paper guidelines.

What about Corporate Prospects?



- Philanthropy is not a priority for most corporations.
 - Primary responsibility is to stockholders not the common good.
 - A mere 4 percent of philanthropic dollars come from corporate foundations and philanthropic programs.
- Strategic philanthropy aligns charitable giving with core business objectives.
- **Corporate Social Responsibility** takes many forms.

Corporate Social Responsibility Menu

- **Corporate Foundation**

- Endowed and incorporated as tax-exempt entity
- Similar to private foundation
- Most transparent – Files 990PF, publishes guidelines,

- **Corporate Citizenship**

- Local focus
- Employee Volunteer Programs
- Employee Donation Committees
- Federated Campaigns

- **Corporate Giving Program**

- Administered within a for-profit corporation - often based in community relations or marketing department
- Annual grant totals usually tied to company/unit pre-tax profits
- May involve employee donation committee

- **Cause Related Marketing**

- Relevant to company services and products
- Cause fits with corporate brand
- Achieves specific business objective, i.e., sales, brand recognition, market expansion

End With A Good Fit!

Five More Rules

1. Never contact a funder or submit a proposal without thoroughly reviewing funder guidelines and annual list of grants.
2. Ensure the proposed project's goals, objectives, measurable outcomes advance the funder's mission and strategic goals.
3. Understand and follow the procedural and format guidelines!
4. Know who reads your proposal.
5. Go beyond funder's mission statement when making your case.

Turning Research into Relationships

- Reconnaissance Missions
- Define the Relationship
- Understand the Yes and the No

Reconnaissance Mission

Talk to the Funder

- Do your homework!
 - Read guidelines before call!
 - Fully understand CSR approach.
- Do not treat as fishing expedition.
- Do not engage in extended pitch session.
- Ask specific questions.
- ***Listen carefully.***
- ***Build Relationship.***

Define the Relationship

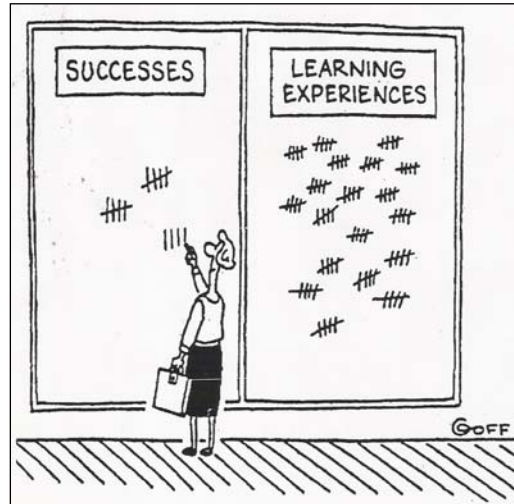
- Funder Types & Approaches
 - Program–Driven
 - Outcomes-Driven
 - Relationship-Bbased
 - High Engagement
 - National Perspective
 - Community Foundations

Define the Relationship

- Mutual Benefit versus Power Differential
 - Neither Salesman nor Supplicant
 - Collegial, Open, Honest
 - Co-Learners
- Funders Least Favorite Applicants Types
 - ATM Applicants
 - Off Roaders
 - Shot Gunners
 - Slackers

Understand the Final Decision

- The Answer is Yes!
 - Maybe—the Conditional Yes
- Three Types of No
 - Personal Judgment
 - Categorical No
 - Policy No



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More Questions, Answers & Challenges



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Resources and URLs

- Center for Health and Health Care in Schools
<http://www.healthinschools.org/>
- Council on Foundation Affinity Group Network
<http://www.cof.org/about/affinitygroups.cfm?navItemNumber=16238>
- Foundation Center
<http://foundationcenter.org/>
- Fundsnet
<http://www.fundsnet.com/>
- GrantSpace, Foundation Center's Learning Community
<http://www.grantspace.org>
- Grantsmanship Center Funding Sources (free and fee-based)
<http://www.tgci.com/funding.shtml>

Resources and URLs (cont.)

- Grant Professionals Association (GPA) (fee)
<http://grantprofessionals.org/>
- GrantStation (fee-based) Included in GPA Membership
<http://www.grantstation.com>
- Guidestar
<http://www2.guidestar.org/>
- Juvenile Justice Information Exchange
<http://jije.org/>
- Michigan State University
<http://staff.lib.msu.edu/harris23/grants/2sgalpha.htm>
- Nonprofit World Funding Alert
<http://www.snpo.org/publications/fundingalert.php>

Resources and URLs

- Praxis Project
<http://www.thepraxisproject.org/>
- Regional Grantmaker Associations
<http://www.givingforum.org/>
- Resist (<http://www.resistinc.org/>)
- Virtual Cap News
<http://www.virtualcap.org/blog/feeds/rss.cfm>
- Mapping Change: Using a Theory of Change to Guide Planning and Evaluation
<http://www.grantcraft.org/index.cfm?fuseaction=Page.ViewPage&pageId=1542>
- Innovation Network Logic Model Builder (see Tools & Resources)
<http://www.innonet.org/index.php?>

Prospect Screening Worksheet

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Date *Research Completed*

***Foundation* Basic Information**

Name	
Address	
Contact Person	
<i>Website URL</i>	

Summary of the foundation's mission and the specific grantmaking initiative best suited to project.

Financial Data

Total Assets	
Total Grants Paid	
Grant Ranges/ <i>Typical Grant</i>	
Period of Funding/Project	

Is Funder a Good Match?	Funder	Your Organization/<i>Project</i>
Subject Focus (list in order of importance)	1. 2. 3.	1. 2. 3.
Geographic Limits		
Type(s) of Support	1. 2. 3.	1. 2. 3.
Population(s) Served		
Type(s) of Recipients, <i>including representative grants</i>		

Application Information

Does the funder have printed guidelines and/or application forms?	
<i>Preferred</i> Initial Approach (letter of inquiry, formal proposal)	
Deadline(s)	
Board Meeting Date(s)	

Sources of Above Information

<input type="checkbox"/> 990-PF -- Year:	<input type="checkbox"/> Reviewed
<input type="checkbox"/> Annual Report -- Year:	<input type="checkbox"/> Reviewed
<input type="checkbox"/> <i>Foundation Center Director Online or other</i> directories/grant indexes (<i>specify</i>)	
<input type="checkbox"/> Grantmaker Web site <input checked="" type="checkbox"/> <i>Grantmaker communication</i> _____ (<i>summarize</i>)	
<input checked="" type="checkbox"/> <i>Other (specify, e.g. Funder Guidelines included in Form 990, Funders online grant database)</i>	

Notes (Provide an assessment of the prospect's match to your project.)

Proposed Request (Specify and justify amount of request and type of support requested.)

NATIONAL TAXONOMY OF EXEMPT ENTITIES - CORE CODES (NTEE-CC) CLASSIFICATION SYSTEM (rev. May 2005)

A ARTS, CULTURE & HUMANITIES

- A01 Alliances & Advocacy
- A02 Management & Technical Assistance
- A03 Professional Societies & Associations
- A05 Research Institutes & Public Policy Analysis
- A11 Single Organization Support
- A12 Fund Raising & Fund Distribution
- A19 Support NEC
- A20 Arts & Culture**
- A23 Cultural & Ethnic Awareness
- A24 Folk Arts
- A25 Arts Education
- A26 Arts & Humanities Councils & Agencies
- A27 Community Celebrations
- A30 Media & Communications**
- A31 Film & Video
- A32 Television
- A33 Printing & Publishing
- A34 Radio
- A40 Visual Arts**
- A50 Museums**
- A51 Art Museums
- A52 Children's Museums
- A54 History Museums
- A56 Natural History & Natural Science Museums
- A57 Science & Technology Museums
- A60 Performing Arts**
- A61 Performing Arts Centers
- A62 Dance
- A63 Ballet
- A65 Theater
- A68 Music
- A69 Symphony Orchestras
- A6A Opera
- A6B Singing & Choral Groups
- A6C Bands & Ensembles
- A6E Performing Arts Schools
- A70 Humanities**
- A80 Historical Organizations**
- A82 Historical Societies & Historic Preservation
- A84 Commemorative Events
- A90 Arts Services**
- A99 Arts, Culture & Humanities NEC**

B EDUCATION

- B01 Alliances & Advocacy
- B02 Management & Technical Assistance
- B03 Professional Societies & Associations
- B05 Research Institutes & Public Policy Analysis
- B11 Single Organization Support
- B12 Fund Raising & Fund Distribution
- B19 Support NEC
- B20 Elementary & Secondary Schools**
- B21 Preschools
- B24 Primary & Elementary Schools
- B25 Secondary & High Schools
- B28 Special Education
- B29 Charter Schools
- B30 Vocational & Technical Schools**
- B40 Higher Education**
- B41 Two-Year Colleges
- B42 Undergraduate Colleges
- B43 Universities
- B50 Graduate & Professional Schools**
- B60 Adult Education**
- B70 Libraries**
- B80 Student Services**
- B82 Scholarships & Student Financial Aid
- B83 Student Sororities & Fraternities
- B84 Alumni Associations
- B90 Educational Services**
- B92 Remedial Reading & Encouragement
- B94 Parent & Teacher Groups

B99 Education NEC

C ENVIRONMENT

- C01 Alliances & Advocacy
- C02 Management & Technical Assistance
- C03 Professional Societies & Associations
- C05 Research Institutes & Public Policy Analysis
- C11 Single Organization Support
- C12 Fund Raising & Fund Distribution
- C19 Support NEC
- C20 Pollution Abatement & Control**
- C27 Recycling
- C30 Natural Resources Conservation & Protection**
- C32 Water Resources, Wetlands Conservation & Management
- C34 Land Resources Conservation
- C35 Energy Resources Conservation & Development
- C36 Forest Conservation
- C40 Botanical, Horticultural & Landscape Services**
- C41 Botanical Gardens & Arboreta
- C42 Garden Clubs
- C50 Environmental Beautification**
- C60 Environmental Education**
- C99 Environment NEC**

D ANIMAL-RELATED

- D01 Alliances & Advocacy
- D02 Management & Technical Assistance
- D03 Professional Societies & Associations
- D05 Research Institutes & Public Policy Analysis
- D11 Single Organization Support
- D12 Fund Raising & Fund Distribution
- D19 Support NEC
- D20 Animal Protection & Welfare**
- D30 Wildlife Preservation & Protection**
- D31 Protection of Endangered Species
- D32 Bird Sanctuaries
- D33 Fisheries Resources
- D34 Wildlife Sanctuaries
- D40 Veterinary Services**
- D50 Zoos & Aquariums**
- D60 Animal Services NEC**
- D61 Animal Training
- D99 Animal-Related NEC**

E HEALTH CARE

- E01 Alliances & Advocacy
- E02 Management & Technical Assistance
- E03 Professional Societies & Associations
- E05 Research Institutes & Public Policy Analysis
- E11 Single Organization Support
- E12 Fund Raising & Fund Distribution
- E19 Support NEC
- E20 Hospitals**
- E21 Community Health Systems
- E22 General Hospitals
- E24 Specialty Hospitals
- E30 Ambulatory & Primary Health Care**
- E31 Group Health Practices
- E32 Community Clinics
- E40 Reproductive Health Care**
- E42 Family Planning
- E50 Rehabilitative Care**
- E60 Health Support**
- E61 Blood Banks
- E62 Emergency Medical Services & Transport
- E65 Organ & Tissue Banks
- E70 Public Health**
- E80 Health (General & Financing)**

E86 Patient & Family Support

- E90 Nursing**
- E91 Nursing Facilities
- E92 Home Health Care
- E99 Health Care NEC**

F MENTAL HEALTH & CRISIS INTERVENTION

- F01 Alliances & Advocacy
- F02 Management & Technical Assistance
- F03 Professional Societies & Associations
- F05 Research Institutes & Public Policy Analysis
- F11 Single Organization Support
- F12 Fund Raising & Fund Distribution
- F19 Support NEC
- F20 Substance Abuse Dependency, Prevention & Treatment**
- F21 Substance Abuse Prevention
- F22 Substance Abuse Treatment
- F30 Mental Health Treatment**
- F31 Psychiatric Hospitals
- F32 Community Mental Health Centers
- F33 Residential Mental Health Treatment
- F40 Hot Lines & Crisis Intervention**
- F42 Sexual Assault Services
- F50 Addictive Disorders NEC**
- F52 Smoking Addiction
- F53 Eating Disorders & Addictions
- F54 Gambling Addiction
- F60 Counseling**
- F70 Mental Health Disorders**
- F80 Mental Health Associations**
- F99 Mental Health & Crisis Intervention NEC**

G DISEASES, DISORDERS & MEDICAL DISCIPLINES

- G01 Alliances & Advocacy
- G02 Management & Technical Assistance
- G03 Professional Societies & Associations
- G05 Research Institutes & Public Policy Analysis
- G11 Single Organization Support
- G12 Fund Raising & Fund Distribution
- G19 Support NEC
- G20 Birth Defects & Genetic Diseases**
- G25 Down Syndrome
- G30 Cancer**
- G32 Breast Cancer
- G40 Diseases of Specific Organs**
- G41 Eye Diseases, Blindness & Vision Impairments
- G42 Ear & Throat Diseases
- G43 Heart & Circulatory System Diseases & Disorders
- G44 Kidney Diseases
- G45 Lung Diseases
- G48 Brain Disorders
- G50 Nerve, Muscle & Bone Diseases**
- G51 Arthritis
- G54 Epilepsy
- G60 Allergy-Related Diseases**
- G61 Asthma
- G70 Digestive Diseases & Disorders**
- G80 Specifically Named Diseases**
- G81 AIDS
- G83 Alzheimer's Disease
- G84 Autism
- G90 Medical Disciplines**
- G92 Biomedicine & Bioengineering
- G94 Geriatrics
- G96 Neurology & Neuroscience
- G98 Pediatrics
- G9B Surgical Specialties

G99 Diseases, Disorders & Medical Disciplines NEC

H MEDICAL RESEARCH

- H01 Alliances & Advocacy
- H02 Management & Technical Assistance
- H03 Professional Societies & Associations
- H05 Research Institutes & Public Policy Analysis
- H11 Single Organization Support
- H12 Fund Raising & Fund Distribution
- H19 Support NEC
- H20 Birth Defects & Genetic Diseases Research**
- H25 Down Syndrome Research
- H30 Cancer Research**
- H32 Breast Cancer Research
- H40 Diseases of Specific Organ Research**
- H41 Eye Diseases, Blindness & Vision Impairments Research
- H42 Ear & Throat Diseases Research
- H43 Heart & Circulatory System Diseases & Disorders Research
- H44 Kidney Diseases Research
- H45 Lung Diseases Research
- H48 Brain Disorders Research
- H50 Nerve, Muscle & Bone Diseases Research**
- H51 Arthritis Research
- H54 Epilepsy Research
- H60 ALLERGY-RELATED DISEASES RESEARCH**
- H61 Asthma Research
- H70 Digestive Diseases & Disorders Research**
- H80 Specifically Named Diseases Research**
- H81 AIDS Research
- H83 Alzheimer's Disease Research
- H84 Autism Research
- H90 Medical Disciplines Research**
- H92 Biomedicine & Bioengineering Research
- H94 Geriatrics Research
- H96 Neurology & Neuroscience Research
- H98 Pediatrics Research
- H9B Surgical Specialties Research
- H99 Medical Research NEC**

I CRIME & LEGAL-RELATED

- I01 Alliances & Advocacy
- I02 Management & Technical Assistance
- I03 Professional Societies & Associations
- I05 Research Institutes & Public Policy Analysis
- I11 Single Organization Support
- I12 Fund Raising & Fund Distribution
- I19 Support NEC
- I20 Crime Prevention**
- I21 Youth Violence Prevention
- I23 Drunk Driving-Related
- I30 Correctional Facilities**
- I31 Half-Way Houses for Offenders & Ex-Offenders
- I40 Rehabilitation Services for Offenders**
- I43 Inmate Support
- I44 Prison Alternatives
- I50 Administration of Justice**
- I51 Dispute Resolution & Mediation
- I60 Law Enforcement**
- I70 Protection Against Abuse**
- I71 Spouse Abuse Prevention
- I72 Child Abuse Prevention
- I73 Sexual Abuse Prevention
- I80 Legal Services**
- I83 Public Interest Law

J99 Crime & Legal-Related NEC

J EMPLOYMENT

- J01 Alliances & Advocacy
- J02 Management & Technical Assistance
- J03 Professional Societies & Associations
- J05 Research Institutes & Public Policy Analysis
- J11 Single Organization Support
- J12 Fund Raising & Fund Distribution
- J19 Support NEC
- J20 Employment Preparation & Procurement**
- J21 Vocational Counseling
- J22 Job Training
- J30 Vocational Rehabilitation**
- J32 Goodwill Industries
- J33 Sheltered Employment
- J40 Labor Unions**
- J99 Employment NEC**

K FOOD, AGRICULTURE & NUTRITION

- K01 Alliances & Advocacy
- K02 Management & Technical Assistance
- K03 Professional Societies & Associations
- K05 Research Institutes & Public Policy Analysis
- K11 Single Organization Support
- K12 Fund Raising & Fund Distribution
- K19 Support NEC
- K20 Agricultural Programs**
- K25 Farmland Preservation
- K26 Animal Husbandry
- K28 Farm Bureaus & Granges
- K30 Food Programs**
- K31 Food Banks & Pantries
- K34 Congregate Meals
- K35 Soup Kitchens
- K36 Meals on Wheels
- K40 Nutrition**
- K50 Home Economics**
- K99 Food, Agriculture & Nutrition NEC**

L HOUSING & SHELTER

- L01 Alliances & Advocacy
- L02 Management & Technical Assistance
- L03 Professional Societies & Associations
- L05 Research Institutes & Public Policy Analysis
- L11 Single Organization Support
- L12 Fund Raising & Fund Distribution
- L19 Support NEC
- L20 Housing Development, Construction & Management**
- L21 Low-Income & Subsidized Rental Housing
- L22 Senior Citizens' Housing & Retirement Communities
- L24 Independent Housing for People with Disabilities
- L25 Housing Rehabilitation
- L30 Housing Search Assistance**
- L40 Temporary Housing**
- L41 Homeless Shelters
- L50 Homeowners & Tenants Associations**
- L80 Housing Support**
- L81 Home Improvement & Repairs
- L82 Housing Expense Reduction Support
- L99 Housing & Shelter NEC**

M PUBLIC SAFETY, DISASTER PREPAREDNESS & RELIEF

- M01 Alliances & Advocacy
- M02 Management & Technical Assistance
- M03 Professional Societies & Associations
- M05 Research Institutes & Public Policy Analysis
- M11 Single Organization Support
- M12 Fund Raising & Fund Distribution

M19 Support NEC
M20 Disaster Preparedness & Relief Services

M23 Search & Rescue Squads
M24 Fire Prevention

M40 Safety Education

M41 First Aid
M42 Automotive Safety

M60 Public Safety Benevolent Associations

M99 Public Safety, Disaster Preparedness & Relief NEC

N RECREATION & SPORTS

N01 Alliances & Advocacy
N02 Management & Technical Assistance
N03 Professional Societies & Associations
N05 Research Institutes & Public Policy Analysis
N11 Single Organization Support
N12 Fund Raising & Fund Distribution
N19 Support NEC

N20 Camps

N30 Physical Fitness & Community Recreational Facilities

N31 Community Recreational Centers
N32 Parks & Playgrounds

N40 Sports Associations & Training Facilities

N50 Recreational Clubs

N52 Fairs

N60 Amateur Sports

N61 Fishing & Hunting
N62 Basketball
N63 Baseball & Softball
N64 Soccer
N65 Football
N66 Racquet Sports
N67 Swimming & Other Water Recreation
N68 Winter Sports
N69 Equestrian
N6A Golf

N70 Amateur Sports Competitions

N71 Olympics
N72 Special Olympics

N80 Professional Athletic Leagues

N99 Recreation & Sports NEC

O YOUTH DEVELOPMENT

O01 Alliances & Advocacy
O02 Management & Technical Assistance
O03 Professional Societies & Associations
O05 Research Institutes & Public Policy Analysis
O11 Single Organization Support
O12 Fund Raising & Fund Distribution
O19 Support NEC

O20 Youth Centers & Clubs

O21 Boys Clubs
O22 Girls Clubs
O23 Boys & Girls Clubs

O30 Adult & Child Matching Programs

O31 Big Brothers & Big Sisters

O40 Scouting Organizations

O41 Boy Scouts of America
O42 Girl Scouts of the U.S.A.
O43 Camp Fire

O50 Youth Development Programs

O51 Youth Community Service Clubs
O52 Youth Development - Agricultural
O53 Youth Development - Business
O54 Youth Development - Citizenship
O55 Youth Development - Religious Leadership

O99 Youth Development NEC

P HUMAN SERVICES

P01 Alliances & Advocacy
P02 Management & Technical Assistance
P03 Professional Societies & Associations
P05 Research Institutes & Public Policy Analysis
P11 Single Organization Support
P12 Fund Raising & Fund Distribution
P19 Support NEC

P20 Human Services

P21 American Red Cross
P22 Urban League
P24 Salvation Army
P26 Volunteers of America
P27 Young Men's or Women's Associations
P28 Neighborhood Centers
P29 Thrift Shops

P30 Children & Youth Services

P31 Adoption
P32 Foster Care
P33 Child Day Care

P40 Family Services

P42 Single Parent Agencies
P43 Family Violence Shelters
P44 In-Home Assistance
P45 Family Services for Adolescent Parents
P46 Family Counseling
P47 Pregnancy Centers

P50 Personal Social Services

P51 Financial Counseling
P52 Transportation Assistance
P58 Gift Distribution

P60 Emergency Assistance

P61 Travelers' Aid
P62 Victims' Services

P70 Residential Care & Adult Day Programs

P71 Adult Day Care
P73 Group Homes
P74 Hospices
P75 Supportive Housing for Older Adults

P80 Centers to Support the Independence of Specific Populations

P81 Senior Centers
P82 Developmentally Disabled Centers
P84 Ethnic & Immigrant Centers
P85 Homeless Centers
P86 Blind & Visually Impaired Centers
P87 Deaf & Hearing Impaired Centers
P88 LGBT Centers

P99 Human Services NEC

Q INTERNATIONAL, FOREIGN AFFAIRS & NATIONAL SECURITY

Q01 Alliances & Advocacy
Q02 Management & Technical Assistance
Q03 Professional Societies & Associations
Q05 Research Institutes & Public Policy Analysis
Q11 Single Organization Support
Q12 Fund Raising & Fund Distribution
Q19 Support NEC

Q20 Promotion of International Understanding

Q21 International Cultural Exchange
Q22 International Academic Exchange
Q23 International Exchange NEC

Q30 International Development

Q31 International Agricultural Development
Q32 International Economic Development
Q33 International Relief
Q35 Democracy & Civil Society Development

Q40 International Peace & Security

Q41 Arms Control & Peace
Q42 United Nations Associations
Q43 National Security

Q50 International Affairs, Foreign Policy & Globalization

Q51 International Economic & Trade Policy
Q70 International Human Rights
Q71 International Migration & Refugee Issues
Q99 International, Foreign Affairs & National Security NEC

R CIVIL RIGHTS, SOCIAL ACTION & ADVOCACY

R01 Alliances & Advocacy
R02 Management & Technical Assistance
R03 Professional Societies & Associations
R05 Research Institutes & Public Policy Analysis
R11 Single Organization Support
R12 Fund Raising & Fund Distribution
R19 Support NEC

R20 Civil Rights

R22 Minority Rights
R23 Disabled Persons' Rights
R24 Women's Rights
R25 Seniors' Rights
R26 Lesbian and Gay Rights
R28 Children's Rights

R30 Intergroup & Race Relations

R40 Voter Education & Registration

R60 Civil Liberties

R61 Reproductive Rights
R62 Right to Life
R63 Censorship, Freedom of Speech & Press
R67 Right to Die & Euthanasia

R99 Civil Rights, Social Action & Advocacy NEC

S COMMUNITY IMPROVEMENT & CAPACITY BUILDING

S01 Alliances & Advocacy
S02 Management & Technical Assistance
S03 Professional Societies & Associations
S05 Research Institutes & Public Policy Analysis
S11 Single Organization Support
S12 Fund Raising & Fund Distribution
S19 Support NEC

S20 Community & Neighborhood Development

S21 Community Coalitions
S22 Neighborhood & Block Associations

S30 Economic Development

S31 Urban & Community Economic Development
S32 Rural Economic Development

S40 Business & Industry

S41 Chambers of Commerce & Business Leagues
S43 Small Business Development
S46 Boards of Trade
S47 Real Estate Associations

S50 Nonprofit Management

S80 Community Service Clubs

S81 Women's Service Clubs
S82 Men's Service Clubs

S99 Community Improvement & Capacity Building NEC

T PHILANTHROPY, VOLUNTARISM & GRANTMAKING FOUNDATIONS

T01 Alliances & Advocacy
T02 Management & Technical Assistance
T03 Professional Societies & Associations
T05 Research Institutes & Public Policy Analysis
T11 Single Organization Support
T12 Fund Raising & Fund Distribution
T19 Support NEC

T20 Private Grantmaking Foundations

T21 Corporate Foundations
T22 Private Independent Foundations
T23 Private Operating Foundations

T30 Public Foundations

T31 Community Foundations

T40 Voluntarism Promotion

T50 Philanthropy, Charity & Voluntarism Promotion

T70 Federated Giving Programs

T90 Named Trusts NEC

T99 Philanthropy, Voluntarism & Grantmaking Foundations NEC

U SCIENCE & TECHNOLOGY

U01 Alliances & Advocacy
U02 Management & Technical Assistance
U03 Professional Societies & Associations
U05 Research Institutes & Public Policy Analysis
U11 Single Organization Support
U12 Fund Raising & Fund Distribution
U19 Support NEC

U20 General Science

U21 Marine Science & Oceanography

U30 Physical & Earth Sciences

U31 Astronomy
U33 Chemistry & Chemical Engineering
U34 Mathematics
U36 Geology

U40 Engineering & Technology

U41 Computer Science
U42 Engineering

U50 Biological & Life Sciences

U99 Science & Technology NEC

V SOCIAL SCIENCE

V01 Alliances & Advocacy
V02 Management & Technical Assistance
V03 Professional Societies & Associations
V05 Research Institutes & Public Policy Analysis
V11 Single Organization Support
V12 Fund Raising & Fund Distribution
V19 Support NEC

V20 Social Science

V21 Anthropology & Sociology
V22 Economics
V23 Behavioral Science
V24 Political Science
V25 Population Studies
V26 Law & Jurisprudence

V30 Interdisciplinary Research

V31 Black Studies
V32 Women's Studies
V33 Ethnic Studies
V34 Urban Studies
V35 International Studies
V36 Gerontology
V37 Labor Studies

V99 Social Science NEC

W PUBLIC & SOCIETAL BENEFIT

W01 Alliances & Advocacy
W02 Management & Technical Assistance
W03 Professional Societies & Associations
W05 Research Institutes & Public Policy Analysis
W11 Single Organization Support
W12 Fund Raising & Fund Distribution
W19 Support NEC

W20 Government & Public Administration

W22 Public Finance, Taxation & Monetary Policy
W24 Citizen Participation

W30 Military & Veterans' Organizations

W40 Public Transportation Systems

W50 Telecommunications

W60 Financial Institutions

W61 Credit Unions

W70 Leadership Development

W80 Public Utilities

W90 Consumer Protection

W99 Public & Societal Benefit NEC

X RELIGION-RELATED

X01 Alliances & Advocacy
X02 Management & Technical Assistance
X03 Professional Societies & Associations
X05 Research Institutes & Public Policy Analysis
X11 Single Organization Support
X12 Fund Raising & Fund Distribution
X19 Support NEC

X20 Christianity

X21 Protestant
X22 Roman Catholic

X30 Judaism

X40 Islam

X50 Buddhism

X70 Hinduism

X80 Religious Media & Communications

X81 Religious Film & Video
X82 Religious Television
X83 Religious Printing & Publishing
X84 Religious Radio

X90 Interfaith Coalitions

X99 Religion-Related NEC

Y MUTUAL & MEMBERSHIP BENEFIT

Y01 Alliances & Advocacy
Y02 Management & Technical Assistance
Y03 Professional Societies & Associations
Y05 Research Institutes & Public Policy Analysis
Y11 Single Organization Support
Y12 Fund Raising & Fund Distribution
Y19 Support NEC

Y20 Insurance Providers

Y22 Local Benevolent Life Insurance Associations, Mutual Irrigation & Telephone Companies & Like Organizations

Y23 Mutual Insurance Companies & Associations

Y24 Supplemental Unemployment Compensation

Y25 State-Sponsored Worker's Compensation Reinsurance Organizations

Y30 Pension & Retirement Funds

Y33 Teachers Retirement Fund Associations
Y34 Employee Funded Pension Trusts

Y40 Fraternal Societies

Y41 Fraternal Beneficiary Societies
Y42 Domestic Fraternal Societies

Y43 Voluntary Employees Beneficiary Associations (Non-Government)

Y44 Voluntary Employees Beneficiary Associations (Government)

Y50 Cemeteries

Y99 Mutual & Membership Benefit NEC

Z UNKNOWN

Z99 Unknown

NEC = Not Elsewhere Classified

The National Taxonomy of Exempt Entities – Core Codes (NTEE-CC) is the industry-wide standard for nonprofit organizational classification.

For more information, please contact:
The National Center for Charitable Statistics @
The Center on Nonprofits and Philanthropy
The Urban Institute
Website: www.nccs.urban.org
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Master List Type of Support Terms: The type of support code is used to designate the specific type of funding provided. Generally, indexers assign the one code that best describes the type of support awarded. A second type of support code is only assigned when the grant provides more than one type of support, e.g., a grant that provides general operating support and support for a specific program within the agency. Some of these types of support are specific to corporate philanthropy, program-related investments, or direct support of individuals.

<p>ANNUAL CAMPAIGN any organized effort by a nonprofit to secure gifts on an annual basis; also called annual appeals</p>
<p>AWARDS/GRANTS BY NOMINATION ONLY</p>
<p>AWARDS/PRIZES/COMPETITIONS grants for artists' awards, prizes, competitions, housing, living space and work space</p>
<p>BRIDGE LOAN short-term loan to provide temporary financing until more permanent financing is available</p>
<p>BUILDING/RENOVATION grants for constructing, renovating, remodeling, or rehabilitating property. Includes general or unspecified capital support awards</p>
<p>BUSINESS START-UP/EXPANSION an area of activity supported by the investments of foundations or funders, the purpose of which is to stimulate the business sector</p>
<p>CAPITAL CAMPAIGN a campaign to raise funds for a variety of long-term purposes such as building construction or acquisition, endowments, land acquisition, etc.</p>
<p>CAUSE-RELATED MARKETING linking gifts to charity with marketing promotions</p>
<p>CHARITABLE USE REAL ESTATE program-related investments in properties that are used for charitable purposes. In most cases, a property such as a building is held by a foundation, who in turn donates or leases it at below market rates to a nonprofit organization. In other cases, a property consists of either land or buildings that are held for a period of time by a foundation and then either given away as a grant or sold to a nonprofit or to a government agency</p>
<p>COLLECTIONS ACQUISITION grants to libraries or museums to acquire permanent materials as part of a collection, usually books or art</p>
<p>COLLECTIONS MANAGEMENT/PRESERVATION grants for maintenance, preservation and conservation of materials</p>
<p>COMMISSIONING NEW WORKS grants to support the creation of new artistic works</p>
<p>COMPUTER SYSTEMS & EQUIPMENT grants to purchase or develop automated systems</p>
<p>CONFERENCES/SEMINARS includes workshops</p>
<p>CONSULTING SERVICES professional staff support provided by the foundation to a nonprofit to consult on a project of mutual interest or to evaluate services (not a cash grant)</p>
<p>CONTINUING SUPPORT a grant that is renewed on a regular basis</p>
<p>CURRICULUM DEVELOPMENT awards to schools, colleges, universities and educational support organizations to develop general or discipline-specific curricular</p>

<p>DEBT REDUCTION a grant to reduce a recipient organization's indebtedness; also referred to as deficit financing. Frequently refers to mortgage payments.</p>
<p>DONATED EQUIPMENT surplus furniture, office machines, paper, appliances, laboratory apparatus, or other items that may be given to charities, schools, or hospitals</p>
<p>DONATED LAND land or developed property. Institutions of higher education often receive gifts of real estate; land has also been given to community groups for housing development or for parks or recreational facilities.</p>
<p>DONATED PRODUCTS companies giving away what they make or produce. Product donations can include periodic clothing donations to a shelter for the homeless or regular donations of pharmaceuticals to a health clinic resulting in a reliable supply.</p>
<p>ELECTRONIC MEDIA/ONLINE SERVICES grants for support of projects on the Internet and World Wide Web, including online publications and databases, development of Web sites, electronic networking and messaging services, CD-ROM products, and interactive educational programs</p>
<p>EMERGENCY FUNDS a one-time grant to cover the immediate short-term funding needs of a recipient organization on an emergency basis</p>
<p>EMPLOYEE MATCHING GIFTS usually made by corporate foundations to match gifts made by corporate employees</p>
<p>EMPLOYEE-RELATED SCHOLARSHIPS scholarship program funded by a company-sponsored foundation usually for children of employees; programs are frequently administered by the National Merit Scholarship Corp., which is responsible for selection of scholars</p>
<p>EMPLOYEE-RELATED WELFARE general welfare grants/loans to current or former company employees and their families</p>
<p>EMPLOYEE VOLUNTEER SERVICES an ongoing coordinated effort through which the company promotes involvement with nonprofits on the part of employees. The involvement may be during work time or after hours. Employees may also volunteer on their own initiative; however, that is not described as corporate voluntarism.</p>
<p>ENDOWMENT FUNDS a bequest or gift intended to be kept permanently and invested to provide income for continued support of an organization</p>
<p>EQUIPMENT grants to purchase equipment, furnishings or other materials</p>
<p>EQUITY INVESTMENTS an ownership position in an organization or venture taken through an investment. Returns on the investment are dependent on the profitability of the organization or venture</p>
<p>EXCHANGE PROGRAMS a program that sends students to study in other countries and allows students from those countries to exchange places with its participants</p>
<p>EXHIBITIONS awards to institutions such as museums, libraries or historical societies specifically to mount an exhibit or to support the installation of a touring exhibit</p>
<p>FACULTY/STAFF DEVELOPMENT</p>
<p>FELLOWSHIP FUNDS</p>
<p>FELLOWSHIPS</p>

usually indicates funds awarded to educational institutions to support fellowship programs
FELLOWSHIPS — TO INDIVIDUALS
FILM/VIDEO/RADIO PRODUCTION a grant to fund a specific film, video, or radio production, often named in the grant text. (Do not use for general support of TV/radio stations.)
FOREIGN APPLICANTS applicants from countries other than the U.S. who are eligible to apply for certain programs administered by American foundations
FOUNDATION-ADMINISTERED PROGRAMS
GENERAL/OPERATING SUPPORT grants for the day- to-day operating costs of an existing program or organization or to further the general purpose or work of an organization; also called unrestricted grants
GRADUATE SUPPORT funds awarded to individuals for graduate work through programs administered by the grantmaker
GRANTS BY NOMINATION ONLY scholarships, fellowships, research grants, and other awards or grants for which individuals must be nominated by the grantmakers, an allied institution, or a third party in order to be considered
GRANTS FOR SPECIAL NEEDS funds given directly to individuals or on their behalf, including grants and/or loans to cover medical expenses and other basic needs for economically disadvantaged individuals
GRANTS TO INDIVIDUALS — NEC
INCOME DEVELOPMENT grants for fundraising, marketing and to expand audience base
INTERIM FINANCING short-term loan to provided temporary financing until more permanent financing is available
INTERNSHIP FUNDS usually indicates funds awarded to an institution or organization to support an internship program rather than a grant to an individual
IN-KIND GIFTS a contribution of equipment, supplies, or other property as distinct from a monetary grant Some organizations may also donate space or staff time as an in-kind contribution
LAND ACQUISITION grants to purchase real estate property
LINE OF CREDIT agreement by a bank that a company may borrow at any time up to an established limit
LINKED DEPOSIT a deposit in an account with a financial institution to induce that institution's support for one or more projects. By accruing no interest or low interest on its deposit, a foundation essentially subsidizes the interest rate of the project borrowers.
LOAN GUARANTEE a pledge to cover the payment of debt or to perform some obligation if the person liable fails to perform
LOANED TALENT an aspect of employee voluntarism. It differs from the usual definition of such in that it usually involves loaned professionals and executive staff who are helping a nonprofit in an area involving their particular skills.
LOANS/PROMISSORY NOTES

see "Program-related investments/loans" and "student loans to individuals"
<p>LOANS FOR LOAN FUNDS funding for nonprofit or for-profit institutions that have specialized lending capacities. They obtain capital in the form of equity and low-interest loans (PRIs) from a variety of sources, including foundations and other funders, to form a "lending pool."</p>
<p>MANAGEMENT DEVELOPMENT/CAPACITY BUILDING grants for salaries, staff support, staff training, strategic and long-range planning, capacity building, budgeting and accounting</p>
<p>MATCHING/CHALLENGE SUPPORT a grant which is made to match funds provided by another donor (See also, "Employee matching gifts")</p>
<p>MORTGAGE FINANCING funds to lending organizations providing low-interest mortgages to needy individuals</p>
<p>OFFICERS & TRUSTEES DISCRETIONARY GRANTS</p>
<p>PERFORMANCE/PRODUCTION COSTS a grant to cover costs specifically associated with mounting a performing arts production, often named in the grant text</p>
<p>POSTGRADUATE SUPPORT funds for the pursuit of advance research or study after receiving a doctoral degree</p>
<p>PRECOLLEGE SUPPORT scholarships and loans given for expenses related to elementary or secondary education, such as private school tuition</p>
<p>PROFESSORSHIPS a grant to an educational institution to endow a professorship or chair</p>
<p>PROGRAM DEVELOPMENT grants to support specific projects or programs as opposed to general purpose grants</p>
<p>PROGRAM EVALUATION grants to evaluate a specific project or program; includes awards both to agencies to pay for evaluation costs and to research institutes and other program evaluators</p>
<p>PROGRAM-RELATED INVESTMENT/LOANS a loan to an organization for a project related to the foundation's stated purpose and interests</p>
<p>PUBLIC RELATIONS SERVICES may include printing and duplicating, audio-visual and graphic arts services, helping to plan special events such as festivals, piggyback advertising (advertisements that mention a company while also promoting a nonprofit), and public service advertising</p>
<p>PUBLICATION a grant to fund reports or other publications issued by a nonprofit resulting from research or projects of interest to the funder</p>
<p>RECOVERABLE GRANTS funds provided by a philanthropist to fulfill a role similar to equity. A recoverable grants may include an agreement to treat the investment as a grant if the enterprise is not successful, but to repay the investor if the enterprise meets with success.</p>
<p>RESEARCH funds to cover the costs of investigations and clinical trials, including demonstration and pilot projects (Research grants for individuals are usually referred to as fellowships.)</p>
<p>RESIDENCIES a nonmonetary award usually of short duration, usually only for artists of all disciplines to further their creative work. Meals, living quarters, equipment, and studio space may be provided.</p>
<p>SCHOLARSHIP FUNDS</p>

<p>a grant to an educational institution or organization to support a scholarship program, mainly for students at the undergraduate level (See also "employee-related scholarships")</p>
<p>SCHOLARSHIPS — TO INDIVIDUALS</p>
<p>SEED MONEY a grant to start, establish or initiate a new project or organization; may cover salaries and other operating expenses of a new project. Also called start-up funds.</p>
<p>STUDENT AID see "Fellowships," "Scholarships - to individuals," and "Student loans - to individuals"</p>
<p>STUDENT LOANS--TO INDIVIDUALS assistance awarded directly to individuals in the form of educational loans</p>
<p>SUPPORT FOR GRADUATES OR STUDENTS OF SPECIFIC SCHOOLS applicants are restricted to those who attend or have attended a specific school. Some programs may also specify institutions to be attended after graduation. In many cases, application must be made through the high school or college instead of the foundation.</p>
<p>TECHNICAL ASSISTANCE operational or management assistance given to nonprofit organizations, including fundraising assistance, budgeting and financial planning, program planning, legal advice, marketing and other aids to management</p>
<p>TECHNICAL EDUCATION SUPPORT funds awarded to individuals to attend postsecondary institutions that offer certificates in education directly related to preparation for specific careers, and which require no more than two years of study</p>
<p>TRAVEL GRANTS awards that cover transportation and/or out-of-town living expenses. Enrollment in a college or university is not usually required</p>
<p>UNDERGRADUATE SUPPORT funds awarded to individuals for undergraduate work through programs administered by the grantmaker</p>
<p>WORK-STUDY GRANTS grants for educational expenses given to students who engage in a part-time work arrangement. A work commitment of 10-15 hours per week is usually required.</p>

Intended Beneficiary/Population Group Codes

The Intended Beneficiary/Population Group Code is a two-digit alphanumeric code used to describe the characteristics (age, sex, race/ethnic heritage, and other characteristics) of the population that is intended to benefit from the grant activity. Codes A1 through A6 are used for grants which benefit both males and females within particular age categories. Multiple Codes may be assigned when the intended beneficiary group is identified by multiple characteristics (e.g., disabled children, black women, Hispanic refugees) or when a grant program benefits more than one population group (e.g., a program to build housing for the disabled as well as low-income senior citizens) or two specified minority groups (e.g., black and Hispanic youth). *Multiple codes are **not** assigned when the intended beneficiary group is identified by the general characteristic of the group.* For example, a grant to increase educational opportunities for minorities should be classified E0 (minorities general); multiple codes should not then be assigned for each specific minority group. Additionally, double-coding is not used for children's grants serving more than one children's age group; instead the general children's code A2 is sufficient.

Code Description

A0	Not specified/general public	M6	Aging, men
A1	Infants/toddlers	M7	Young adults, male
A2	Children/youth	N0	Other named groups
A3	Children	N1	Military/veterans
A4	Youth/adolescents	N2	Offenders/ex-offenders
A5	Adults	N3	Substance abusers
A6	Aging/elderly/senior citizens	N4	AIDS, people with
A7	Young adults	N5	Single parents
D0	Disabilities, people with	N6	Crime/abuse victims
D1	Physically disabled	N7	Terminal illness, people with
D2	Blind/visually impaired	O0	Minorities
D3	Deaf/hearing impaired	O1	LGBTQ
D4	Mentally disabled	O2	Immigrants/refugees
E0	Minorities	P0	Economically disadvantaged
E1	Asians/Pacific Islanders	P1	Homeless
E2	African Americans/Blacks	P2	Migrant workers
E3	Hispanics/Latinos		
E4	Native Americans/American Indians		
E5	Indigenous people		
E9	Minorities, other special group		
F0	Women		
F1	Infants/toddlers, female		
F2	Girls/young women		
F3	Girls		
F4	Youth/adolescents, female		
F5	Adults, women		
F6	Aging, women		
F7	Young adults, female		
M0	Men		
M1	Infants/toddlers, male		
M2	Boys/young men		
M3	Boys		
M4	Youth/adolescents, male		
M5	Adults, men		