

*Provide Enough Food for Poor Farmers in India,
a project by Seva Mandir*



 GlobalGiving

Grantee Toolkit

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1 Introduction

As a nonprofit leader you are looking to increase funding for your programs and establish a track record as an outstanding grantee.

Whether this is your first grant award from GlobalGiving or you are a seasoned grantee, this toolkit is a resource to help you navigate the GlobalGiving grant process.

In this toolkit you will also find practical tips and tools to support your growth as an outstanding grantee, a glossary of commonly used terminology, and FAQs. Don't miss the easy-to-use checklists and tips to help you achieve your goals as a grantee.

Who We Are

GlobalGiving is the largest global crowdfunding community connecting nonprofits and donors in nearly every country. We help nonprofits from Afghanistan to Zimbabwe (and hundreds of places in between) access the tools, training, and support they need to be more effective and make our world a better place.

GlobalGiving is also a public foundation and grantmaking charity. We work with companies, DAFs, and foundations to manage corporate grant programs of every shape and size, and we manage GlobalGiving's own funds to support girls, innovation, disaster-relief, refugees, and many other causes. While our sources of funding vary, GlobalGiving always serves as the ultimate grantmaking institution. Every grantee is vetted by the GlobalGiving team, and the GlobalGiving team is responsible for ensuring your grant project is executed in compliance with U.S. grantmaking guidelines.

As a public charity, GlobalGiving practices flexible grantmaking to fit specific programmatic needs. We can also provide general operating support grants, scholarships, or even grants to individuals. GlobalGiving is committed to identifying practical grant terms and ensuring your project is set up for success.

About GlobalGiving Grants

GlobalGiving (GG) Grants is a comprehensive, online system on globalgiving.org designed to help you manage your organization's grant. GlobalGiving frames its grant cycle in five easy steps:

- 1. Invitation**
- 2. Eligibility**
- 3. Award**
- 4. Implementation**
- 5. Closeout**

GG Grants allows you to manage your entire grant cycle online. You will never have to send or receive documents via email, nor will you print or scan grant agreements for signature. We don't expect you to spend your valuable time printing forms and managing your grant in your inbox!

GlobalGiving aims to be an effective and transparent grantmaker through GG Grants. You shouldn't sit on the other side of your screen, wondering when your grant will move forward in the approval process. Our online grants cycle gives you real-time updates on your grant status, including due diligence, proposal, and reporting.

2 Invitation

The first step in GlobalGiving's grant cycle is invitation to a specific grant program. Criteria for the grant program is typically set in partnership with GlobalGiving and the program's funder.

When a GlobalGiving donor identifies your organization as a potential grantee, we will send you an email invitation to start a new grant cycle.

Our invitation email usually contains:

- 1. Grant program specifics**
- 2. Next steps required for your organization**
- 3. An introduction to your GlobalGiving Grants Manager**



GlobalGiving will review your organization's due diligence materials and/or proposal to be considered for a new grant.

Things to consider before starting due diligence:

- Has my organization received foreign funding before?
- Does my organization maintain a bank account in its name?
- Can my organization demonstrate a history of financial accounting?
- Is my organization publicly supported?
- Is my organization registered with our country's government as a charitable entity?

Things to consider before starting a grant proposal:

- What community challenge does my project seek to solve?
- How much funding does my project require?
- Have I detailed a specific budget for all costs?
- How much time does the project need to ensure completion?
- Will my organization work with community partners to complete the project?
- How will I know if my project is successful?

3 Eligibility

The Eligibility Stage, which includes the due diligence process and the completion of a proposal, ensures your organization is vetted according to GlobalGiving's standards.

Due diligence

GlobalGiving performs rigorous due diligence on all organizations in the GlobalGiving community in order to ensure they perform charitable work in a transparent and accountable manner and meet local requirements for registration with their local government.

We collect and review documentation for every organization, including its legal documents, financial records, program materials, and lists of senior staff and board members, in order to validate that the organization is running the project as described. We also evaluate the organization's capacity to implement activities and review how it communicates about its work. GlobalGiving also researches the organization's relationship with previous funders. Finally, we ensure that the organization is compliant with anti-terror guidelines and international guidelines for philanthropy.

Upon submission of your organization's due diligence application, we will review your application within two weeks.

Key steps

To complete the due diligence application, your organization will be asked to provide documentation based on the country of registration. If your documents are not in English, you must provide English translations; we accept unofficial translations, including those made with Google Translate.

All organizations must submit the following documents:

1. Organization registration number
2. Program materials
3. Disbursement information
4. Names of senior staff and board members
5. Review and signature of GlobalGiving terms and conditions

If your organization is registered in a country other than the United States or United Kingdom you must also submit the following documents:

1. Certificate of government registration
2. Founding document with dissolution clause
3. Financial documents, including two years of financial statements and a current year budget

CHECKLIST

Grantee Application

- ☐ Note deadlines
- ☐ Assign individual to complete due diligence process
- ☐ Gather and submit documents through GG Grants
- ☐ Complete due diligence application
- ☐ Confirm disbursement information



Proposal

The proposal is the mechanism by which your organization communicates its intent to deliver a project within a given budget and timeline. The proposal demonstrates to GlobalGiving that your organization has a clear and actionable plan for its grant. It should fully explain the activities, costs, and the timeline of the proposed grant.

Key steps

- 1.** Describe the project for which your organization seeks support, including: overall goal of the project, total anticipated number of participants served, and communities served.
- 2.** Provide a detailed budget document that outlines a reasonable estimate of project costs and a line item breakdown of projected spending.
- 3.** Detail a realistic timeline for the project. This includes identifying when key deliverables are expected to be completed.
- 4.** Demonstrate to the funder that your organization has a well designed scope of work that deserves to be funded.

4 Award

The award stage, which includes the execution of the grant agreement, establishes the framework and expectations for your grant. The award stage also kicks off the grant activity with a disbursement of grant funds.

Grant Agreement

The grant agreement is an official outline the activities which the grantee will execute within a specific time period according to an approved budget. The grant agreement serves as a point of reference for any questions you may have regarding spending periods, use of funds, payment schedules, reporting dates, reporting requirements, record maintenance, and prohibited activities.

Key steps

- 1.** Once you receive a notification email from GlobalGiving that your grant agreement is ready for review and signature, login to GG Grants via GlobalGiving.org to access the agreement.
- 2.** Review each section of the grant agreement to ensure you agree with the terms. Key sections include: summary of charitable work, proposal and budget, spending period, reporting dates, and reporting requirements.
- 3.** Sign the grant agreement within seven business days. You may download the grant agreement and proposal and add users via GlobalGiving Grants to share with colleagues.

CHECKLIST

What To Do When You Receive Your Grant Agreement

- ☐ Consider scheduling a kick off meeting with your team to set expectations for the grant.
- ☐ Mark the expenditure period and report due dates on your calendar and share these dates with any colleagues that will be spending or reporting on funds including implementers and accountants.
- ☐ Review the reporting requirements and templates and share them with any colleagues that will support in reporting including implementers and accountants.
- ☐ Discuss record maintenance with accountants to ensure that all grant records are maintained and readily available to GlobalGiving should it be necessary.
- ☐ Review your original grant budget. A template to track expenditures according to each line item may be helpful in tracking your grant's progress, and it will help you submit clear financial reports to your grantor.
- ☐ Review prohibited activities to ensure that your grant activities nor internal policies conflict and ensure all grant implementers understand these terms, too.
- ☐ Make sure those involved have access to grant information, including reporting deadlines and grant agreement details, by adding them as Grantee Users via GG Grants.
- ☐ Request that the appropriate person, normally the Executive Director, review and sign the grant agreement electronically via GG Grants.

Disbursement

Your grant funds will be disbursed according to the schedule outlined in your grant agreement. GlobalGiving will send funds via ACH, Fxecute, or check according to the disbursement details provided in your due diligence application. You can review these details by logging into your GG Grants Dashboard. The standard disbursement period is two to six weeks, however you will receive email notification once funds are sent.

5 Implementation

The grant implementation phase is the core of the grant activity during which the work outlined in the proposal is accomplished. Communication with your Grants Manager via reporting and otherwise, including email, phone calls, and site visits is critical to successful implementation.

Key Considerations for Implementation

- If you expect a shift in grant activity, including changes in timeline, budget, scope immediately communicate such changes to your Grants Manager via email. Your Grants Manager is glad to help you in problem solving to assure the grant is executed as appropriate. At times, an amendment to your grant agreement may be necessary to adjust the budget, scope or timeline.
- Start collecting materials that will help you show your project's impact, including photos, videos, testimonials, case studies, copies of presentations, survey results, etc.

Reporting

Reporting is an opportunity to showcase the incredible work you have been able to accomplish through the grant. Many grantees find that they can repurpose report material for blog posts, social media, or newsletters to showcase the impact they have had during the grant period. Additionally, strong reports are great collateral to prove your track record when applying for future grants.

Learn More About Reports

Narrative report

Strong narrative reports provide an update on the grant activity outlined in the proposal. We recommend revisiting the original proposal and identifying key objectives or outcomes before crafting your report. Reports may also be used to communicate any challenges experienced during the implementation period, and if necessary, provide recommendations for shifts in scope. There is no specific narrative template and we invite you to share your narrative report however you see fit.

Financial report

Strong financial reports are detailed, clear, and align with your grant budget. Your financial report should report only on grant funds received, not overall project or organizational funds. All financials must be in USD. Should there be any shifts in expenditure or variations in line items, this should be clearly reflected in the report along with an explanation for such variation.

Impact report

Your grant may require an impact report to highlight grant outcomes and key metrics. Be sure to review impact report questions in advance to ensure you can adequately report on each indicator.

Additional Attachments

Share any additional material that help tell your grant story including photos, videos, testimonials, case studies, copies of presentations, survey results, etc.

Common Grant Complications

Line item variation

If there is a shift in spending between line items notify your Grants Manager. Clearly state the reason for the shift, detail the line items and amounts, and whether further changes are expected. Please note that an amendment to the grant agreement may be required.

Example *We have had some minor changes in preparing for the educational workshops for the grant. The workshop locations are further from our headquarters than originally anticipated. The locations are close to the target audience and are likely to draw higher attendance if there are less barriers to transport. Additionally, we identified a workbook that has been utilized in similar workshops and consistently received positive feedback from participants. We think these workbooks would enhance the effectiveness of the workshops. Because of these learnings we are requesting a shift in expenditure to move funds from Program Coordinator Salary to Program Materials and Transportation to Workshops. Please see the attached budget details.*

Expense	Original Budget Amount	Proposed Change as of Dec 20, 2017	Difference
Program Coordinator Salary	\$800	\$500	-\$300
Program Materials	\$700	\$900	\$200
Transportation to Workshops	\$500	\$600	\$100
TOTAL	\$2,000	\$2,000	\$0

Underspending of funds

If you do not spend your total grant award amount before the end of the award period, this should be reflected in your final financial report. Include an explanation for the underspending, suggestion for reallocation, and timeline of when funds will be expended. If you identify underspending before the final report is due, you may reach out to your Grants Manager.

Example *Due to barriers to transportation during the rainy season, we were unable to complete our final training scheduled for August, which had a cost of \$5,000. Would we be able to reschedule the final training, and costs of \$5,000, to be incurred in October after the end of the rainy season?*

6 Closeout

Closing out your grant is an opportunity for strengthening the relationship with the funder and identifying other funding sources.

Key steps

1. Reach out to your Grant Manager to learn how to diversify your income with crowdfunding.
2. Since your organization already has gone through the due diligence process with GlobalGiving, it is a great opportunity to easily join our crowdfunding community through our virtual training program, the Accelerator.
3. New to crowdfunding? Read all about how to be successful crowdfunding in Crowdfundamentals.
4. Develop a press release to share out with your community. Share out all the amazing work you have done over the duration of your grant! This can add legitimacy to your organization and allow your donors and community members more insight into your organization. Share this press release on your website, Facebook, and with local news sources. Before creating a press release, please consult with your funder if you desire to use their name and logo. You can find a template on our resource library, Learn.

7 Glossary

<i>Term</i>	<i>Definition</i>
Amendment	A contractual agreement of changes to be made to the terms of the original grant agreement, signed by both the grantee and grantor.
Award	The stage of the grant process in which your organization receives its grant funds.
Disbursement	The sending of grant funds to your organization by GlobalGiving. Funds can be sent via wire, FXecute, or check.
Due Diligence	GlobalGiving performs rigorous due diligence on every organization in the GlobalGiving community in order to ensure they are performing charitable work in a transparent and accountable manner, and that they meet local requirements for registration with their local government.
Expenditure period	The timeframe outlined in your grant period during which you are able to spend grant funds.
Financial report	An update on how all grant funds were expended. It should report only on grant funds received, not overall project or organizational funds. All financials must be in USD. Should there be any shifts in expenditure or variations in line items, this should be clearly reflected in the report along with an explanation for such variation.
GG Grants	The online platform where you will manage your grant with GlobalGiving via www.globalgiving.org .
Grant Agreement	The contractual arrangement between GlobalGiving and your organization outlining the expectations for the grant. The grant agreement will include expenditure period, terms and conditions, reporting details, and disbursement schedules. It is the first resource for any questions you have regarding grant expectations.

<i>Term</i>	<i>Definition</i>
Grant Manager	The individual from GlobalGiving with whom you will work during the duration of your grant. Any questions or updates you have regarding your grant should be directed to your grant manager via email.
Implementation	The implementation stage of the grant process which includes the execution of the project. During this phase you will perform the work that was outlined during your grant proposal.
Line item	The specific line in the proposed budget that describes a given grant activity and the exact amount you will spend on this activity.
Midterm report	A midterm report, including narrative and financial portions, may be required at the halfway point of the expenditure period to share project successes and/or challenges. The midterm report may be tied to additional disbursements. Expectations for reporting are outlined in the grant agreement.
Narrative report	A report describing the grant activity implemented to date that also highlights any challenges experienced during the implementation period and if necessary, provides recommendations for shifts in scope.
Payment schedule	The specific dates and timeline in which your grant funds are expected to be sent. Please note that disbursements may be dependent on approved reports.
Signatory	The staff member at your organization that has the authority to sign the grant agreement.
Subgrantee	An organization that is granted funds from the primary grantee.

8 Frequently Asked Questions

How will my funds be disbursed?

Your funds will be disbursed according to the disbursement details provided in your due diligence application (options are ACH, FExecute, or check). You can review these details by logging into GlobalGiving.org and accessing your Organization Dashboard.

I am leaving my organization. Can I add a different person as the grantee contact?

Yes, you can add additional contacts by logging into GG Grants on GlobalGiving.org, selecting the Grants dropdown menu, and clicking on the “Users” button.

How can I renew my grant?

Typically, you should reach out to your corporate partner regarding any grant renewal opportunities.

Is there a standard length of the narrative report?

There is no standard length for narrative reports. Strong narrative reports provide an update on the grant activity outlined in the proposal. We recommend revisiting the original proposal and identifying key objectives or outcomes before crafting your report.

Do you have a template for the reports?

All reports are to be submitted online via GG Grants. There is no fixed template for financial or narrative reports, however your grant may include an impact report template. Login into GG Grants and review the report page of your grant for details.