

Funder Custom Fields and Activities (for CiviCon April 2012)




Custom fields for institutional funders








▼ Grant Info

Funding Areas Civic Engagement Communications
 Media Rights and Access Arts and Culture

Issue Interests
Immigrant Rights
Workers Rights
Environmental Justice
Reproductive Justice

Requirements Notes

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The Made-Up Foundation requires the following of their grantees:

- budget under \$2 million
- serves marginalized communities in the Midwest
- office walls are painted purple

Funder Outreach activity and custom fields

Save Cancel

Added By * Jervis, Lisa

With Contact Made-Up Foundation X Madeup-Funder, Marisol X

Assigned To

You can optionally assign this activity to someone. Assigned activities will appear in their Activities listing at CiviCRM Home.
A copy of this activity will be emailed to each Assignee.

Subject

Campaign

Engagement Index

Location

Date * Time (clear)

Duration Total time spent on this activity (in minutes).

Status *

Details

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🗑️ 🔍 ABC ☰ ☰ ☰ ☰ 📄 Source 🔍 ?

From amalia: Marisol Madeup-Funder and I had a great convo in which she said they are increasingly interested in how communications trainings can elevate their work. She is interested in getting grantees Spanish-language spokesperson trainings in the first half of FY12-13.

Priority *

▼ Funder Outreach Info

Contact Source	<input type="text" value="amalia met Marisol at"/>
Funder Outreach Next Steps	<input type="text" value="Kristi to send funder p"/>

Grant activity and custom fields

Added By * Jervis, Lisa

With Contact **Made-Up Foundation** **Madeup-Funder, Marisol**

Assigned To

You can optionally assign this activity to someone. Assigned activities will appear in their Activities listing at CiviCRM Home.
A copy of this activity will be emailed to each Assignee.

Subject \$100K for FY12-13

Campaign - select -

Engagement Index - select -

























Location








































Date * 07/01/2012 Time 07:06PM (clear)

Duration Total time spent on this activity (in minutes).

Status * Committed

Details

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We had originally talked about a grantee initiative to deliver Spanish-language spokesperson trainings, but through discussions with Marisol it was decided that we should apply for funds for a strategy convening for the communications staff of 5 orgs from among her grantees.

Convening to take place in Nov 2012 with three follow-up webinars in Jan-March 2013.

Priority * Normal

Proposal Info

Ask Amount 100,000.00

Proposal Status Submitted

Amount Received 75,000.00

Date to be Received 08/01/2012 (clear)

Grant Period Start 08/01/2012 (clear)

Grant Period End 07/31/2013 (clear)

Grant Number 1234-5678

Proposal guidelines, finished proposal, and grant agreement can be stored as attachments.

Report activity (no custom fields)

Save **Cancel**

Added By * Jervis, Lisa

With Contact Made-Up Foundation X Madeup-Funder, Marisol X

Assigned To

You can optionally assign this activity to someone. Assigned activities will appear in their Activities listing at CiviCRM Home.
A copy of this activity will be emailed to each Assignee.

Subject Midyear Report on grant 1234-5678

Campaign - select -

Engagement Index - select -

Location

Date * 12/31/2012 Time 07:16PM (clear)

Duration Total time spent on this activity (in minutes).

Status * Scheduled

Details

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[Icons] Source [Icons]

Narrative report of no more than 500 words and budget to actuals for the grant to date. To be submitted online via www.madeofmoney.org/jumphroughhoops. Complete reporting guidelines attached.

Priority * Normal

Attachment(s)

Reporting guidelines and finished reports can be stored as attachments.

Sample pipeline report

A	B	C	D	E	F	G	H	I	J	K	L	M
Funder Name	Activity Type	Activity Date	Subject	Details	Activity Status	Contact Source	Funder Outreach Next Steps	Ask Amount	Proposal Status	Amount Received	Grant Period Start	Grant Period End
Test, Individual Funder	Funder Outreach	2/23/12	Testing the funder outreach cust	<p>	Not Required	NM Civic	send brochures					
Test Funder	Funder Outreach	2/24/12	testing doc attachments	<p>	Not Required							
Made-Up Foundation	Funder Outreach	2/24/12	The Made-Up Foundation should	From amalia: Marisol Madeup-Funder and I had a great convo in which she said they are increasingly interested in how communications trainings can elevate their work. She is	Not Required	amalia met Marisol at the Midwest Civic Engagement Funders Meeting	Kristi to send funder packet 4/15 and Mac to call to follow up 4/30					
Test Funder	Grant	2/13/12	Test Proposal 2/13/12		Verbally Committed			10000	Submitted		0	
Test Funder	Grant	2/17/12	Test potential grant 2/17/12	<p> this is a grant that is prospective.</p>	Hot			40000	Not Yet Submitted		0	
Made-Up Foundation	Grant	7/1/12	\$100K for FY12-13	<p> We had originally talked about a grantee initiative to deliver Spanish-language spokesperson trainings, but through discussions with Marisol it was decided that we should apply for funds for a strategy convening for the communications staff of 5 orgs from among her grantees.</p><p> Convening to take place in Nov 2012 with three follow-up webinars in Jan-March 2013.</p>	Committed			100000	Accepted		75000	August 1st, 2 July 31st, 2013
Made-Up Foundation	Report	12/31/12	Midyear Report on grant 1234-5	<p> Narrative report of no more than 500 words and budget to actuals for the grant to date. To be submitted online via www.madeofmoney.org/jumthroughoops. Complete reporting guidelines attached.</p>	Scheduled							

The downside is that reporting is exported search and so not dynamic.