Tips for Searching
*Foundation Directory Online Professional*

**Basic searching (Find Funding)**

This is the most basic, simple-to-use search option within the Foundation Directory Online. Just type in what you’re looking for in an almost conversational manner. Example: “animal shelter in Cincinnati Ohio,” then click the “search” button.

*Or*

Use the “Advanced Search & Filters” option (recommended...don’t be intimidated by the use of “advanced,” we’ll make it easy)
Advanced searching

Even though you’ll notice lots of options, we’re really only going to focus on three, for the most part. The first of which is...

**Subject Area**

- You can either click within the box to open the dropdown menu pictured above, or simply start typing what your organization’s focus is. In the example above, before I was even finished typing the word “animal,” the following options appeared. Check the box for the specific area you want and it automatically populates in the “subject area” field. You can choose as many related subjects as you like.
You have to start typing before any suggested places pop up. Above, you’ll see that after typing “Hamilton,” many options appeared, including “Hamilton County (Ohio, United States),” which we’re going to choose for this example. Like the “Subject Area” field before it, you can choose multiple places.
Here, you can narrow the specific type of support you’re seeking. In this example, the hypothetical nonprofit is interested in getting funding for their animal shelter in Hamilton County, Ohio. But by using the “Support Strategy” field, they could further limit their funding request to foundations willing to fund “Equipment” necessary to the nonprofit’s mission. This would then exclude foundations who have listed “Equipment” in their limitations field, saving you some time by not looking too far into funders who aren’t willing to help you in this matter.

*Initiate the search*
Results page

- Results come in four main groups, and are color coded across the database for easier recognition of what information you’re looking at. We’re going to focus on “Grantmakers.”

Grantmakers results

- The screen that results from clicking “View Grantmakers Only” provides some crucial options. First, you’ll probably want to scroll up a bit and click the box to “Exclude grantmakers not accepting applications.” By doing so, you’ll ensure you only invest time in researching funders accepting applications at this time.
- Next, click the name of the foundation you want to investigate to pull up their information. For this demonstration, we’re going to pick The Greater Cincinnati Foundation. Turn to the next page of this guide to dig into the most important funder information the Foundation Directory Online provides.
Individual funder’s information profiles

At a glance

- The first page you see offers some general interest info about the foundation, including the most common grant amount given. However, we’re probably interested in a little more in-depth aspects of the foundation to find out if they’re a proper fit, so we’re going to look at aspects like...

About

- Find out more about the funder’s purpose and history. This is all information that helps you decide if they’re a good fit, and shows the funder you’ve done the proper research.
Other Funders to Consider

- This fantastic feature automatically populates funders who may be good matches for your nonprofit based on the criteria that gave you the funder you initially clicked, in this case the Greater Cincinnati Foundation.

Application info

- This absolutely crucial section tells you what you need to know about the application process. Each funder will have different steps and different required elements of the proposal, so careful attention must be paid to their stipulations. Also in this section, you’ll find the ever important “initial approach” preference. Following each and every guideline reassures the funder that your nonprofit does its research and follows directions. Scrolling down slightly from the screen shown above will list the giving limitations of the funder. Check this carefully to make sure your nonprofit doesn’t fall into any of the categories the given funder explicitly states they will not fund.
Who’s Who

- When you reach out in the initial contact with a funder, make sure you know who you’re talking to and why you’re talking to them. This list gives you the important people you need to know within a foundation. Do you happen to recognize any names? If you do, use that connection to its fullest potential! Share this list of names with your key stakeholders in case they recognize any of these names.

Communications

- News, social media, and publications. All further avenues for you to find out more about a potential funder.
- When reaching out to a potential funder, even if all manner of contact methods are listed, make sure you use the preferred method laid out in their “initial approach” discussed above. A funder isn’t required to list all ways and means of contact. So if their initial approach preference is a phone call, but it’s not listed in this section, head to their website to get it.

Financials

- One of the main purposes stated by the Foundation Directory Online is that the information it collects makes the time consuming task of scanning a funder’s 990s obsolete. However, should you choose to do so, you’ll find everything you need in the financials section.
Saving your research

- The Foundation Directory Online gives you many great options to save your research. While you may print paper copies of your findings from our computers reserved for grant research, it is strongly recommend you archive your work digitally. By doing so, you’re making it easier to add your findings to a cloud-based storage system which gives you and all your colleagues easy and quick community access to potential funders. To save your work digitally, look for the following toolbar:

To save your work to a flash drive, click the PDF icon. Email yourself or a colleague with this mail icon. Keep in mind you’re not emailing a link to the database. Database access is only available at the Main Library. You’re emailing a PDF of the given profile.

Creating a potential funder spreadsheet

- If you know you’re not going to visit the library to use the database in the near future, but want a list of funders to research via their websites, social media, or other publically available contact methods, the Foundation Directory Online can create a spreadsheet which provides a quick snapshot of useful information.

  - Find your full funder list

(spreadsheet instructions continued on next page)
• The funder list can also be pulled up by following the breadcrumb trail shown below

- Find Funding > Search Results > Grantmaker Search Results > Grantmaker Record

• Click the box shown below to select the first page of funder results. This will select the first 100 funders

```
Grantmakers (116)

GRANTMAKERS FILTERS
- Favorites Only
- Exclude grantees not accepting applications
- Funders Only

<table>
<thead>
<tr>
<th>Grantmaker</th>
<th>City</th>
<th>State</th>
<th>Country</th>
<th>Total Assets</th>
<th>Total Giving</th>
<th>Amount Funded</th>
<th>Grant Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fidelity Charitable</td>
<td>Cincinnati</td>
<td>OH</td>
<td>United States</td>
<td>$21,223,553,196</td>
<td>$3,764,811,986</td>
<td>$47,859</td>
<td>82</td>
</tr>
<tr>
<td>Amazonsmile Foundation</td>
<td>Seattle</td>
<td>WA</td>
<td>United States</td>
<td>$4,344,696</td>
<td>$19,865,419</td>
<td>$15,004</td>
<td>42</td>
</tr>
</tbody>
</table>
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• Next, click the grid icon indicated in the following image

```
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*(spreadsheet instructions continued on next page)*
In the menu that pops up, remember to title your file with a name that will let others know what information a given spreadsheet contains. In the example below, the title reflects a spreadsheet that contains potential funders that resulted from the following search: Subject Area: “Domesticated animals,” Geographic Focus: “Hamilton County, OH”