



Ten Ways to Use Philanthropy Southwest's Giving Study Foundation Excel Spreadsheets

1. Open the foundation spread sheet and use the contact information to expand your general mailing list of foundations.
2. Sort the list first by assets and then by giving and take a deeper look at the size and scope of foundations in your state.
3. Sort the list by city and county and see if you are familiar with foundations in your back yard.
4. Look at the Recipient Categories field and get a sense of the major interest areas of foundations in your city and/or county.
5. Go to the series of fields that show the dollar amount given to 25 major recipient categories. Sort these fields in descending order and identify the leading funders by amount given.
6. Resort the list by ruling year to identify the newer foundations. Invite these new foundations to a specific program geared toward new foundations, perhaps on grantmaking basics, and provide them a chance to meet grantmaking colleagues.
7. Open the grants excel spreadsheet and sort it in descending order by grant amount. Identify colleagues and peers making the largest grants, and learn the organizations they are supporting.
8. Sort the list by recipient city within state. What are the needs being funding in your own headquarters city? By looking at the donor foundation's city and state, you learn about the flow of dollars into your geographic area.
9. Sort the list by recipient name. Identify organizations receiving funding from multiple foundations. Look at your own grant recipients. Are there other foundations supporting your grantees that you might want to meet and/or recruit into being a member of the Conference of Southwest Foundations?
10. Using the grants lists, evaluate the personalities of foundations in your geographic area and in your priority giving areas. Use the NTEE code fields to sort the list by the 25 major recipient categories and more than 200 more specific fields of interest. Place a check mark next to young family foundations or independent foundation and send them a cover letter about your foundation and/or the Southwest Council, encouraging them to connect with you for programs and/or strategic partnerships. The letter should contain information culled from the Recipient Categories field and/or the grant recipient lists that indicate the value connecting with you will bring.

Foundation excel spreadsheets are for use by Philanthropy Southwest members only and should not be reproduced or distributed.