The UConn Library offers **two databases** to help you find money:

- *Pivot* and *Foundation Directory Online (FDO)*

**Similarities:**
- Both will identify funding opportunities (Opps) for research, travel, fellowships, training, etc.
  - Global and local opportunities from:
    - Private organizations
    - Commercial & non-profit organizations
    - Foundations
    - Government (federal and state)
- **Pivot** is funded by the Office of the Vice President for Research (OVPR) and the UConn Library
- **FDO** is funded by the UConn Foundation Center and the UConn Library

**Differences:**
- **PIVOT** via ProQuest allows you to:
  - Track and share *current* global funding opportunities
  - Set up funding *alerts* for weekly updates of *new grants* available in your field
  - **Collaborate** with other researchers by sharing individual research profiles
  - Sync your **ORCID ID** (a persistent digital identifier) with Pivot [https://orcid.org/](https://orcid.org/)
  - Updated daily
  - *Search Pivot without an account, but you miss the functionality of the tool!*
- **FDO**, a leading authority on institutional philanthropy, allows you to:
  - Identify U.S. grantmakers (private or corporate) that have *given in the past* to nonprofit organizations similar to yours.
    - View the kinds of organizations the foundation gives to
    - View how much funding goes to organizations like yours
    - View which areas of your organization you should highlight
  - Database is built on IRS tax information returns (Forms 990 and 990-PF) filed by funders and recipients, grantmaker websites, annual reports, and other sources
  - Updated weekly
  - You **cannot** set up funding alerts or track grants in FDO, but you can send results to spreadsheet

**To access** these databases:
- Library webpage [lib.uconn.edu](http://lib.uconn.edu) ➔ click Databases ➔ click Grants on bottom screen

  ![Find Databases Of: Dissertations & Theses • e-Books • Grants](image)

OR
- Library webpage [lib.uconn.edu](http://lib.uconn.edu) ➔ Databases ➔ By Database Name ➔ type *pivot* or *foundation*

**Search Tips** for both databases:
- **Be flexible!**
  - Identify focus
    - Example: *students with learning disabilities*
    - Example: *teachers who teach children with learning disabilities*
  - Use **simple concepts** and have **synonyms** for each concept(s)
    - Example: *learning disorders; learning disabilities; dyslexia; math anxiety; dysgraphia*
- **Natural language** versus **Controlled Vocabulary/Index terms** (created by Pivot and FDO)
Search with **natural language** for the **broadest** retrieval, as both databases will **match** your **exact search term(s) anywhere in the record**.

- Example of results found in Pivot abstracts when searching the general term *obesity*:
  
  “This challenge area focuses on the societal challenge to end **obesity** among children.”

  “Areas **ineligible for funding** under this grant include addiction, **obesity**, etc.”

  “Research into **obesity** is currently **outside the scope of this program**.”

Results will determine if you should search with **broad terms** or more **specific terms**

- Example: *learning disorders* vs. *attention deficit hyperactivity disorder*

  **NOTE**: FDO calls natural language searching - **Keyword Search**, which is the opposite in Pivot.

Search with **index terms**/controlled vocabulary for **less retrieval**. These terms, created by the database indexers, describe the **content** of the grant and are found in a **specific part** of the record. Usually controlled vocabulary excludes irrelevant opportunities.

- Example: *Run for Good Program* was a funding opportunity (time sensitive) on obesity in children, but the grant abstract used the phrase *unhealthy eating options* instead of *obesity*. Pivot indexers assigned the Keyword *Obesity* to this record because it best describes the **content** of the grant.

Pivot created **Keywords**, a controlled vocabulary, to index opportunities in Pivot.

- Keywords are listed below the abstract in the grant record; the Keywords are not linked
- To find Pivot Keywords click **Browse by Keyword** or **Search by Keyword** or **Advanced Search**
- Pivot Keywords may not be specific or match your topic, so go broader: *Invasive species* or *marine biology* instead of “*zebra mussels*” *Crop science* or *agricultural engineering* instead of “*potato breeding*”

FDO automatically translates your search term(s) into their Subject terms.

- Look at the Index terms under **Funding Interests** within the Opp record to get ideas
- **Funding Interests** include Subjects, Population Groups, Geographic Areas served, etc.

- **More options:**
  - Use **quotes** for the exact phrase (adjacency) to narrow focus:
    - “*childhood obesity*”
    - “*solar energy*”
    - “*food security*”
  - Use the ‘w/’ proximity tool to search for terms within a particular number of words of each other.
    - *Solar w/5 energy* (within five words) [This is available in Pivot.]
  - Use **AND** between different concepts to narrow focus:
    - “*climate change*” AND *agriculture*
  - Use **OR** between similar concepts to broaden focus:
    - “*climate change*” OR *warming*
    - *obesity* OR *obese* OR *overweight*
  - Use an **asterisk** * as a truncation –
    - *child* will find children, childhood, childlike
    - *child* AND *obes*
PIVOT via ProQuest

Create a Pivot account @ http://pivot.uconn.edu

- Click Sign Up link on the header of page in Pivot
  - Create an account using your uconn.edu email; complete required fields; click Create my account button
- Your UConn email becomes your Pivot Username!
  - A confirmation email will be immediately sent to your address
  - Click the Confirm link in the email to validate your account

Start your Funding Discovery - Click Funding from gray toolbar and choose one of the following:

- Search by Text – enter your own terms
- Search by Sponsor – enter name of organization (i.e. World Health Organization)
- Search by Keyword to find Pivot Keywords – enter your term or navigate hierarchical menu tree using the drop box.
  - Search will OR multiple Keywords
  - AND multiple Keywords using the Advanced Search and select Match ALL (see page 6)
- Browse by Keyword - an interactive visualization; hover over interactive graphic and click keyword topic to find the funding opportunities for that topic (will retrieve huge results)

- Search default is AND when using Search by Text or Search by Sponsor
  - Phrases are searched with an implied AND operator between words:
    - Substance abuse will find results that have both words anywhere in the record but may not be adjacent. Use quotes “substance abuse” to search a phrase.
Example of a **simple search** - Find U.S. Federal funding for substance abuse

- Click **Search by Text**; type **substance abuse**; click **Search Pivot**

- Select **Federal, U.S** below **Top sponsor types** using left bar navigation tool

- Click **Refine Search** to limit to **Applicant Type** (i.e. grad student) or **Funding Type** (i.e. travel, training)

- Click the **Sort** dropdown box next to your results (i.e. sort by Deadlines or Amount).

- **LIMITED Submission** means candidates will be identified through institutional nominations (i.e. UCONN OVPR). More information [https://research.uconn.edu/sps-proposals/lsproposals/](https://research.uconn.edu/sps-proposals/lsproposals/)

- Click **titles** in your **Results** to view full details in the **Abstract**:
  - Funding website & contact person
  - Amount of funds
  - Deadline
  - Applicant Type or Eligibility
  - Click **Pivot Keywords** (located at the bottom of each record) to add to your search
• Set up alerts - You must be signed in to Pivot.
  o Select Opps (check box) that interest you
  o Track opps that are similar
  o Set to Active - opps that you are very interested in
  o Save Search to save your query – it will run every Sunday

Example of an advanced search -- *Find impact of climate change on agriculture*

• Click Advanced Search to search multiple concepts using natural language

  Type (“climate change” OR “global warming”) AND (agriculture OR farming) → Search
• Or search with **multiple Pivot Keywords**-- *Find impact of global warming on farming*
  o Click **Advanced Search**, scroll down and click **Keyword**
  o Type term(s) in the search box, select (click) best match, click **Search**
  o Potential Keywords combinations:  
    - *Agriculture and Food Sciences AND Climate Change*
    - *Agriculture AND Climate Change*
    - *Climate Change AND Sustainability*

**Note -** When combining Pivot Keywords in your search:
- **Match Any** = OR function and will retrieve funding opps with *any* of your Pivot keywords
- **Match ALL** = AND function and will retrieve funding opps that have *all* your Pivot keywords which will narrow results
- **Explode** = incorporates narrower terms under a term

• Use **Advanced Search to focus search** using:
  o **Keywords** (controlled vocabulary terms used to index opportunities in Pivot)
  o **Amount** (monetary amount of funding)
  o **Deadlines for proposals**
  o **Funding Type** (i.e. travel, meeting, research, postdoctoral award, dissertation, etc.)
  o **Requirements** (i.e. Activity location, Citizenship/Residency)
  o **Applicant Type** (i.e. graduate student, new faculty, etc.)
  o **Sponsor Type** (i.e. academic, U.S. Federal, multinational, etc.)

Click [home icon] to view your **Pivot webpage** and track your options for Funding Opportunities
- **Active** – Funding Opps on your “short list” of highest priority funding opportunities
- **Tracked** – Funding Opps you want to keep your eye on, not crucial
- **Saved Searches** – Weekly funding alerts that identify new opportunities that match your queries
  o Your results are constantly changing due to Opps deadlines
- **Shared** – List of Opps that you shared with colleagues
- **Received** - List of Opps sent to you by colleagues and are pending your action
- **Advisor** is Pivot’s way of analyzing your Profile and matching you with funding Opps
- Use the **Options** drop down [Options icon] to manage your Opps (i.e. Share, Untrack)

**Pivot Scholar Profile for researchers & faculty**
- Create a Pivot account and then claim your **Pivot Scholar Profile**
- Your profile will highlight your research information and publications
  o Upload your CV (in .doc or .pdf format), or provide link to your publication page
  o The **Advisor** function in Pivot will deliver new funding information based on your area of research.
Pivot is pre-populated with UConn researcher profiles listed on University academic department websites.
- If department websites are unavailable, or if no faculty members are listed on a department’s website, faculty profiles will be created by Pivot based on data available (one week for profile).
- Pivot is now integrated with ORCID, a nonprofit group which provides a registry of unique and persistent digital identifiers for researchers so that researchers are connected to their research. [http://orcid.org/](http://orcid.org/)

**Claim your Pivot Scholar profile:**
1. Log in to Pivot.
2. Use the **Profiles** tab to search by name or browse list of potential profile matches within UCONN departments.
   - Click the **Claim a Profile** link once you have located your profile.
3. If you do not find your profile, click the link **Claim or Create a profile** to have Pivot create one.
   - Pivot can create profiles for faculty, staff and graduate students.

**Search Pivot profiles of faculty at UCONN and scholars around the world**
- Locate experts and potential collaborators based on their research and publishing.
  - Click **Profiles** from toolbar → **Click Advanced search**
    - Search by **topic** (e.g. depression) within your institution or outside your institution.
    - **Search by Name** of scholar (e.g. Dr. Cheryl Beck).
  - Pivot verifies affiliation and publication information of scholars through their linking process using ONLY ProQuest databases, ERIC, Agricola, and PubMed. NOTE: EBSCO is not used.

**Need Pivot Help?**
- [http://proquest.libguides.com/pivot/welcome](http://proquest.libguides.com/pivot/welcome) or [HELP](http://proquest.libguides.com/pivot/welcome) when signed in to Pivot
- Guides:
  - [http://guides.lib.uconn.edu/grants](http://guides.lib.uconn.edu/grants)
  - [http://proquest.libguides.com/pivot/welcome](http://proquest.libguides.com/pivot/welcome)
Sample of email Alerts provided to you from Pivot:

#1. Updates on an Opp that I am tracking. From ProQuest Pivot <fundingalert@cos.com>

To: Valori, Valori <valori.valori@uconn.edu>
Subject: Updated Funding Opportunity - United States Department of Health and Human Services (HHS)

The Pivot editorial team updated the following information on a funding opportunity that you are tracking on Aug 08, 2018.

- deadline
- amount
- contact
- sponsor url

A summary of this opportunity is listed below.

<table>
<thead>
<tr>
<th>Opportunity Title</th>
<th>What's due</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Physical Activity and Weight Control Interventions Among Cancer Survivors: Effects on Biomarkers of Prognosis and Survival (R21 Clinical Trial Optional)</td>
<td>Application</td>
<td>AIDs and AIDs-related applications are due.</td>
</tr>
<tr>
<td>United States Department of Health and Human Services (HHS)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Institutes of Health (NIH)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>National Cancer Institute (NCI)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deadline(s)</td>
<td>What's due</td>
<td>Notes</td>
</tr>
<tr>
<td>07 Sep 2018 - Confirmed / sponsor</td>
<td>Application</td>
<td>AIDs and AIDs-related applications are due.</td>
</tr>
<tr>
<td>16 Oct 2018 - Confirmed / sponsor</td>
<td>Application</td>
<td>New applications are due.</td>
</tr>
<tr>
<td>16 Nov 2018 - Confirmed / sponsor</td>
<td>Application</td>
<td>Resubmission and revision applications are due.</td>
</tr>
<tr>
<td>07 Jan 2019 - Confirmed / sponsor</td>
<td>Application</td>
<td>AIDs and AIDs-related applications are due.</td>
</tr>
<tr>
<td>16 Feb 2019 - Confirmed / sponsor</td>
<td>Application</td>
<td>New applications are due.</td>
</tr>
<tr>
<td>16 Mar 2019 - Confirmed / sponsor</td>
<td>Application</td>
<td>Resubmission and revision applications are due.</td>
</tr>
</tbody>
</table>

#2. Funding alerts matching my interests based on my saved searches. Fundingalert@cos.com

![Funding Alerts for July 29, 2018](image)
Foundation Directory Online (FDO)

The new FDO Online makes it easier to find prospective funders.

Help Options: 

1. **START Your Search with a simple phrase in the single search box**
   - describe topic in search box (what you do and where)
   - Example: childhood obesity in Connecticut → Search

2. **Click SEARCH -**
   - Your search is automatically translated into FDO headings (click Advanced Search to view)

3. **Results match your search criteria “Showing results for Obesity....”**
   - Highlights summary statistics based on your search
   - Provides Total Dollar Value of Grants on your search topic
   - Scroll results page to see listings based on your search
   - If results are narrow, delete a term that may not be necessary
     - For example, delete Connecticut, click $next to the word and click SEARCH to refresh
   - If results are too broad, click Edit or Advanced Search & Filters and add Filters
   - If results look good, scroll down to view the top 5

4. **Grantmakers list** shows top five grantmakers (of 2,391) specific to your search
   - Each column can be sorted by clicking (i.e., alphabetical, Total Giving, etc.)
Click The Robert Wood Johnson Foundation to view Profile

- Robust Summary for funder: What, Where and Amount of Funding

The Robert Wood Johnson Foundation Most Recent 5 Years At A Glance
They’ve funded 2,875 grants to 1,142 organizations totaling $1,461,121,357

- Scroll page or click to jump to a specific area in the RWJF record (i.e. Grants, Funding Interests, Who’s Who, Applications & Giving Limitations, Contact, or Other Funders To Consider)
- Click Funding Interests for a quick summary of terms that you can adapt in your search by clicking Advanced Search & Filter
- Scroll to Grants to find the number of grants given by RWJF on your topic (1,043)

Click a Recipient to find an organization like yours, then look at their Recipient Profiles for information on grants and past funders.
- From this list, select UCONN to find information on grant
- Notice Subjects and Population Groups (all provided by FDO)
1. Click the **Recipient box** to find details about UCONN
   - Recipient List provides a way to see who else has received funding specific to your search criteria.

5. **Go back to the main Grants List** - includes links to informative details on each grant and details about the recipients of grants based on your search
   - Use breadcrumbs to navigate back
6. View complete list, click View ALL; select specific Tools to print, export or mail

7. Scroll main results page to see Recipients (5,121) listings based on your search:

- Click Recipients to find an organization like yours, then look at their Recipient Profiles for information on grants and past funders.
  - What Type of Organizations are Giving? ($ amount and number of grants)
  - Where are the Funders Located? (i.e. local, national, international)
  - How Big are the Grants? (how much funders are willing to give)
  - See complete list of grants for your topic including the most common grant amount.

8. 990 Tax Forms (funders and recipients are required to submit these forms)
  - Identify prospective funders, especially smaller foundations
  - Identify recently awarded grants and contributions
  - Form shows name or recipient of grant, purpose of grant, and the amount of grant

9. Edit Search – click “Advanced Search & Filters” or Edit link
  - Box will expand to show popular search filters; click Additional Filters to see more options
  - Most popular – click in the box to retrieve specific selections
    - Subject Area – just start typing or select broad categories
    - Geographic Focus - just start typing or select broad categories (i.e. U.S)
    - Population Served - just start typing or select broad categories
  - Organization Name - type a specific name (i.e. Smithsonian), select Grantmakers Only or Recipients Only
  - Click Additional Filters for more filters:
    - Support Strategy (type of support given/received, select from dropdown)
    - Transaction Type (type of monetary support given/received, select from dropdown)
    - Grant amount (enter amount and use your preferred range)
    - Year(s) (use slider for ranges)
    - Keyword – your word(s) will be found anywhere in the record, and not in a specific filter
Keyword searching is useful when your topic doesn’t match FDO’s Subject Terms.
- FDO does not recommend excluding grantmakers (i.e. U.S. Federal Funders)

10. Search by Keyword (obese or obesity or overweight) for funding from RWJ Foundation

11. Click Close Advance Search & Filters to return to Search Results

12. Search examples using Advanced Search:
- Find grantmakers that support engineering in Connecticut:
  - Click within Subject Area box, click down arrow next to Science, select Engineering (it will OR all Engineering specialties)
  - In Geographic Focus start typing Connecticut [Note-this will find grantmakers that have identified Connecticut as a primary area; may miss grantmakers that do not stipulate a specific state]

- Find grantmakers that are accepting applications and are interested in aiding poor people residing in Connecticut:
  - Click within Population Served box for suggestions, click Social and Economic Status from the drop-down, select Economically disadvantaged people
  - Click Connecticut (United States) from drop-down in Geographic Focus.

Navigating the FDO Search Taxonomy
- In FDOs Advanced Search & Filters view, start typing in a field, and matching terms will appear below, with broader and narrower related terms.
- Go to the Help section and look in the table of contents for the Foundation Center’s Subject Terms (also known as FDO Taxonomy Terms) (PDF).
  - Print/bookmark the full list. Mark it up! Highlight terms that describe your mission, programs, population served.
- Or answer these questions: 1) who are you serving? 2) What are you doing for them? The more terms that you can use to describe your project, the more funders you’ll find in FDO.

**Why Can't I Find That Foundation?**
- It’s not a grant making organization
  - The term “foundation” on its own has no legal definition, so any organization can use it in its name. For example, Foundation Directory Online.

- It’s a public charity
  - Private foundations file Form 990-PF, so they’re easy to detect.
  - Grant making public charities file Form 990, the same form used by most nonprofits that don’t make grants.

- It’s not a separate organization
  - Some so-called foundations are donor-advised funds (DAFs).
  - DAFs are separate funds or accounts maintained, operated, and legally controlled by an exempt sponsoring organization, like a community foundation, public charity, or a charitable fund.

- It’s a new foundation that was recently formed
  - Profiles for new foundations are added after they file their initial Form 990-PFs from the IRS, at least one year later after they are established.
  - Many new foundations don’t start awarding grants until 2-3 years after they are initially funded.

- It’s a foundation that was formed in another country
  - Search the Internet to find their websites or news articles about them, or check the grantmakers association’s website for their home countries.
  - [http://www.wingsweb.org/?page=OurNetwork](http://www.wingsweb.org/?page=OurNetwork)

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August 15, 2018