SPIN: QUICK START GUIDE (Searchable Grants Database - Introduction and Search Set-Up)

To register for a live SPIN tutorial or request a personalized session, use the [SPIN Tutorial Sign Up Sheet](https://forms.office.com/Pages/ResponsePage.aspx?id=wuqyrjzhi0yaKOBsxiayq9eeDVqyE3xMjdpsD1Z8gW5UM1JKVktQSllNVjJHMURIUlBVMFgyVFpIRy4u)

When it's time for your tutorial, use this link to join the session ([SPIN Tutorial Zoom Link](https://us02web.zoom.us/j/83799817284?pwd=Z2UvZGdDTW1ndEFib3FtL1RCdHhSdz09).)

Welcome to SPIN – a searchable database for grant-seekers. We hope you find the notes below helpful as you CREATE, REVIEW AND SAVE SEARCHES to find funding opportunities for your project, program or initiative.

This will be more than just an introduction. By the end of the 55-minute class (or independent study) you should have search filters set up and saved so that you will get a tailored list of new prospective funding opportunities sent to your email in box each week.

To get the most out of this session, please use the instructions below to set up a profile at least 30 minutes BEFORE the live session or one business day before you plan to work independently.

**IMPORTANT:** When you find a grant you think you might like to apply for, use this link to

**alert the office of sponsored programs as soon as practical!** ([SU OSP Intent to Submit Form](https://forms.office.com/Pages/ResponsePage.aspx?id=wuqyrjzhi0yaKOBsxiayq9eeDVqyE3xMjdpsD1Z8gW5UQlg2SEtTRzNBRjlZWkE1MzNHRUJaVzJFVC4u))

The more notice we have, the more successful YOU will be.

HOW TO SET UP A PROFILE IN SPIN

1. Go to: <https://spin.infoedglobal.com/Authorize/ModifyProfile>

2. Use you full Shepherd email address as both your email address and your username.

3. Once you request a new profile in SPIN, an administrator will need to approve it. (That's why we ask you to do it ahead of time.)

HOW TO CUSTOMIZE YOUR PROFILE PREFERENCES

1. Go to - <https://spin.infoedglobal.com/Authorize/Login>
2. Check for “Help” menu on the far right of the black bar at top of screen. If not visible, use a different browser because the one you're in isn't fully compatible.
3. SIGN IN! If you forget to do it, you will lose your work before you can save it.
4. Set ALL your preferences! (Don’t skip a category because it seems irrelevant.)
5. Applicant location
6. Applicant type
7. Project type
8. Project location
9. Citizenship
10. Sponsor type (TIP: if you are looking for smaller amounts of money and/or simple application processes, consider focusing on foundations and removing "federal" sources from this list.)
11. You can always go back and update your preferences later, if your funding goals change or you just want to play around and see what different results you get with different settings.

HOW TO CREATE A NEW SEARCH

1. Use KEYWORD search! (Not text search.)
2. Start with a choice from "Category One" and continue choosing from Categories two and three as you wish.
3. Select as many options as apply in the selection box in the lower half of the screen. (You cannot choose options within the "Category" boxes in the upper half of the screen.
4. Choose "Save Selections and Continue."
5. Choose "Locate funding." (Don't be overwhelmed if the numbers in the search bar seem really high. That is the total number of hits available. Once your preferences are applied, the number of results will be much smaller.)
6. If too many results, narrow your search terms and/or preferences and rerun.
7. Once you’ve completed a search (including reviewing and/or saving as noted below) remember to go back and consider the key word paths you haven’t explored yet.

HOW TO REVIEW AND PRIORITIZE SEARCH RESULTS

1. To review more than a handful of results, export to Excel or Word.
2. When reviewing results, consider these criteria first:
3. Deadline (at least 30 days away)
4. Eligibility (IHE or 501c3?)
5. Follow link to agency website and make sure opportunity is current and active
6. If still considering, look at:
   1. Amount (Enough? Too much?)
   2. Cost share requirements (In-kind? Cash?)
   3. Page length (This is a quick indicator of how time consuming the pre-award phase be.)
7. Don’t consider any further until you’ve had a chance to consider all prospective opportunities on the list. (If you go too deep exploring any of the individual options before you've checked all of them, you may run out time and energy before you hit upon the best ones.)

SET UP AND SAVE AUTOMATIC, RECURRING SEARCHES

1. If the results of a particular search seem generally relevant or promising, use SAVE and the database will continue to run this search each week.
2. The results will be sent to your email inbox whenever something new is found. (On weeks when there are no new results, you will not get an email.)
3. Name the search using the Key Words you chose, NOT with the name of the project you are seeking to fund. (Naming after the project can get confusing if you run several searches for the same project, or if in the future you have a new idea for a project which is still relevant to those search terms.)