



# WINNING GRANTS:

## Elevate Your Funding Game

# A LITTLE ABOUT WHO WE ARE



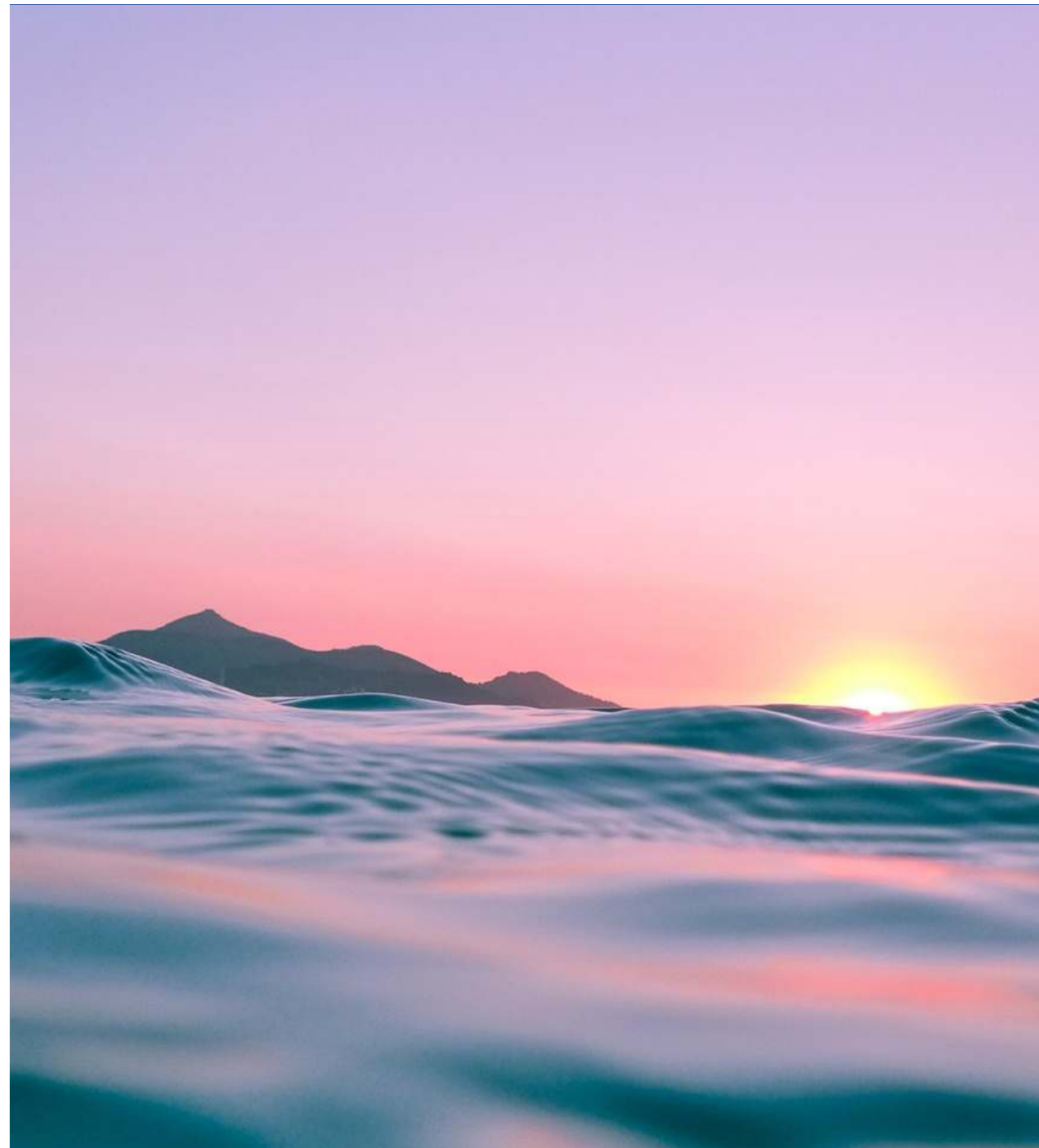
**CAPACITA**  
CONSULTING

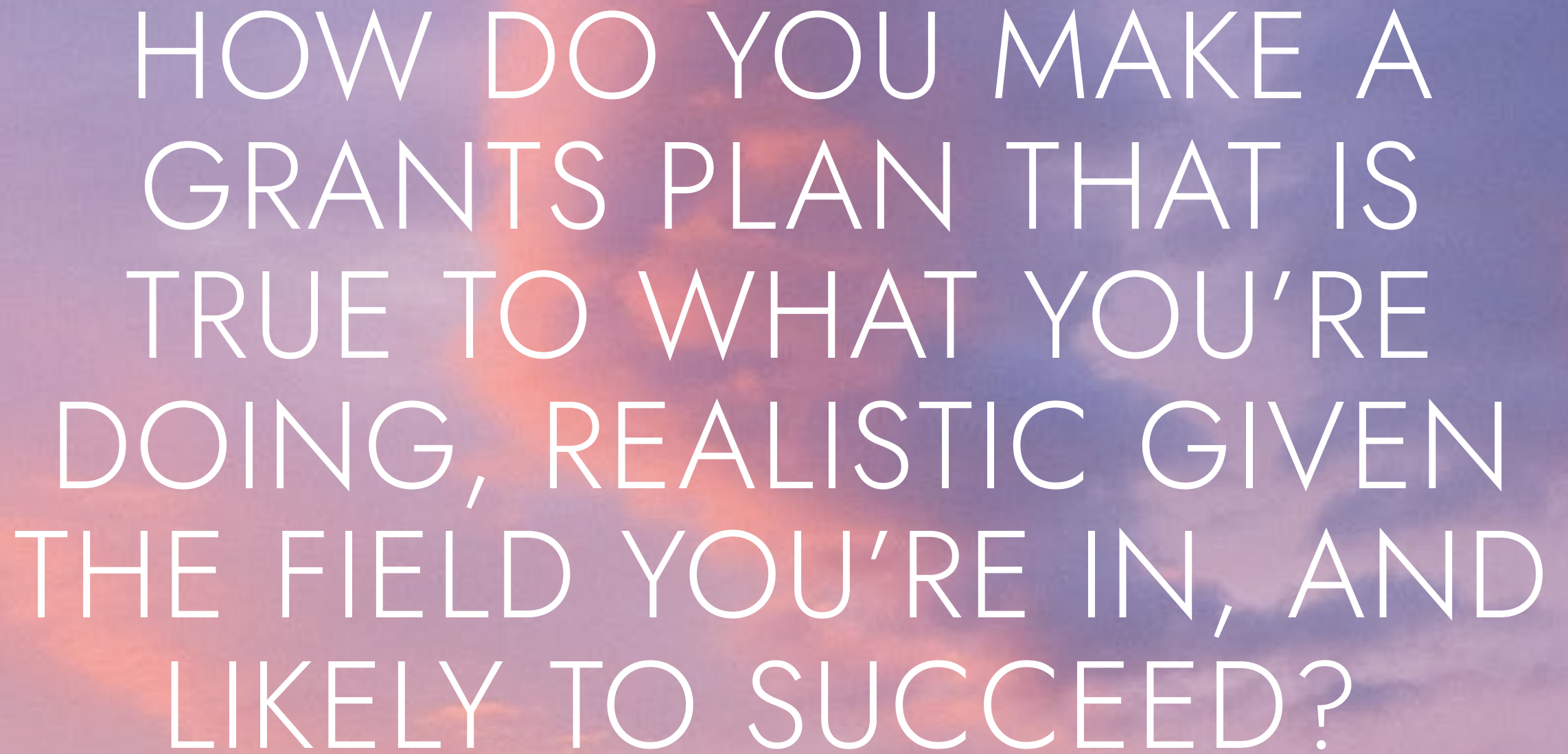


WE HELP MISSION-DRIVEN ORGANIZATIONS  
**REMOVE BARRIERS  
AND REACH THEIR  
GREATEST POTENTIAL.**

We assist nonprofits with strategy development and implementation, with a particular focus on capacity building, fundraising strategy, and grants.

HI THERE!  
**WHO IS IN THE  
ROOM TODAY?**

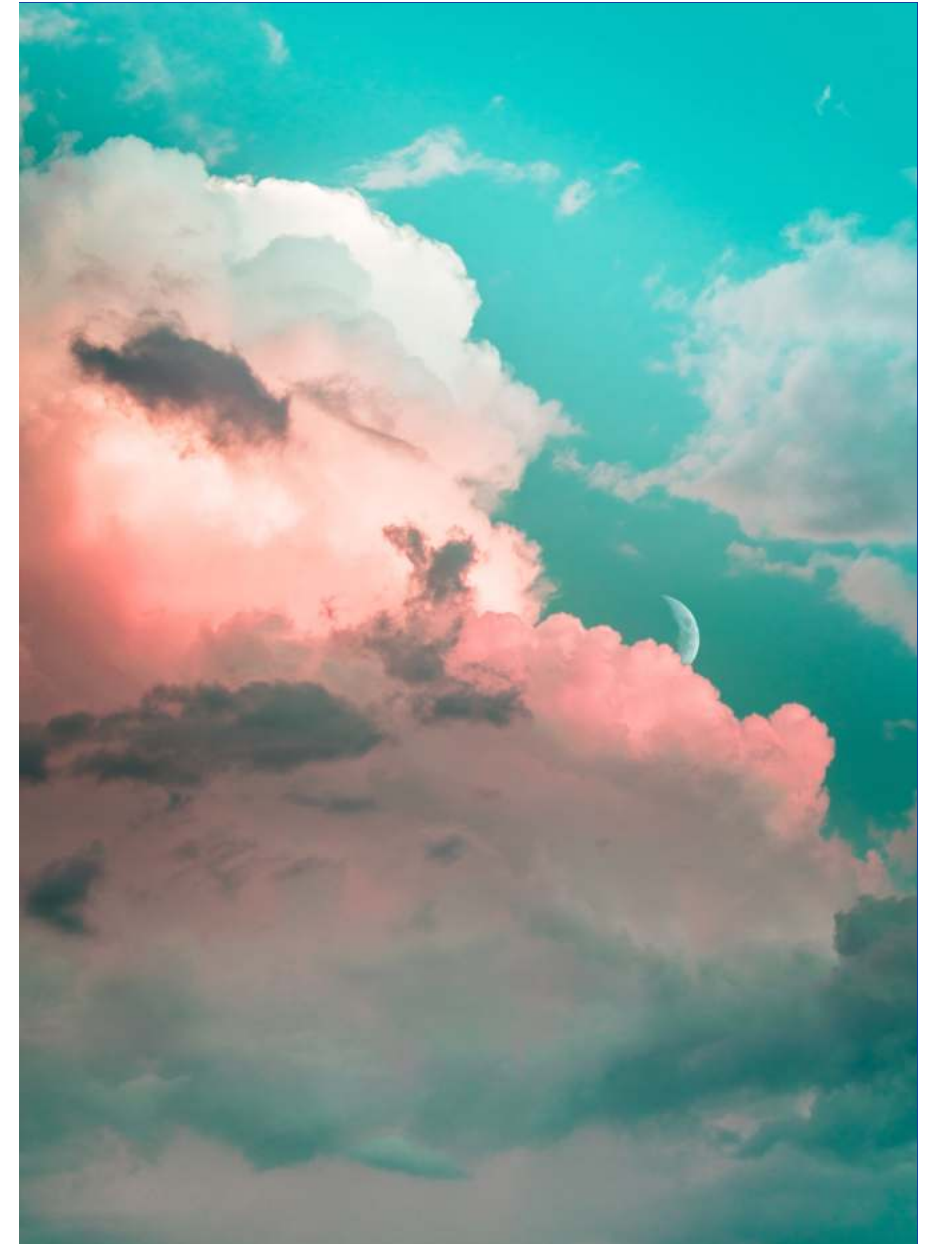




HOW DO YOU MAKE A  
GRANTS PLAN THAT IS  
TRUE TO WHAT YOU'RE  
DOING, REALISTIC GIVEN  
THE FIELD YOU'RE IN, AND  
LIKELY TO SUCCEED?

# MODERN FUNDRAISING

It's the process of soliciting and collecting **donations, grants, and other forms of financial support** to support the mission and programs of your nonprofit.



A night sky with a bright comet streak and stars. The comet streak is a bright, curved line of light that starts from the bottom left and curves towards the top right. The background is a dark blue night sky filled with numerous small, bright stars. The overall scene is serene and inspiring.

IN OTHER WORDS, FUNDRAISING IS  
THE WAY YOU SUSTAINABLY AND  
EFFECTIVELY **POWER YOUR MISSION.**

A question to guide our conversation today

THINK BACK TO A TIME WHEN YOUR ORGANIZATION  
MISSED OUT ON A SIGNIFICANT GRANT



WHAT DO YOU BELIEVE  
WAS THE **KEY MISSING  
PIECE** IN YOUR GRANT-  
SEEKING STRATEGY?





Section 1

IT STARTS WITH THE MESSAGE

ORGANIZATIONS NEED TO  
BE TOTALLY CLEAR ON WHO  
THEY ARE, WHAT THEY DO,  
AND **WHY IT MATTERS.**





**FOCUS ON GETTING YOUR  
STORY AND YOUR PITCH  
AS STRONG AS POSSIBLE.**

THEN USE YOUR NETWORK  
TO HELP DETERMINE WHO  
CARES ABOUT YOUR WORK.

THIS IS WHO YOU WANT  
TO GET IN FRONT OF.

**WHO ARE WE  
AND  
WHO FUNDS THAT?**

Section 2

# THE FUNDING LANDSCAPE



# THE STATE OF PHILANTHROPY IN THE U.S.A.

Data from the Giving USA  
**Annual Report on  
Philanthropy for the Year  
2023**

Total Giving in 2023

**\$557.16B**

Decrease from 2022 Adjusted for Inflation

**2.1%**

Giving by Individuals

**\$374.4B**

Foundation Giving

**\$103.53B**

Corporate Giving

**\$36.55B**

Giving in 2022

**\$499.3B**

Mega-Giving from 6 Individuals/Couples

**2% - \$8B**

# THE FUNDING LANDSCAPE



## Individual Donors

Major donors, annual donors, intermittent donors, planned giving (bequests)



## Fees for Service

e.g. summer camps, after school programs, therapy, counseling, job training



## Institutional Grantmakers

Private or community foundations, governments, or public grantmakers



## Campaigns

Digital, annual, capital



## Corporate Partnerships

Sponsorship, naming rights, volunteering, underwriting



## Contracts

Federal, state, local



## Events

Galas, auctions, panels, etc



## Corporate Philanthropy

Corporate grantmaking programs



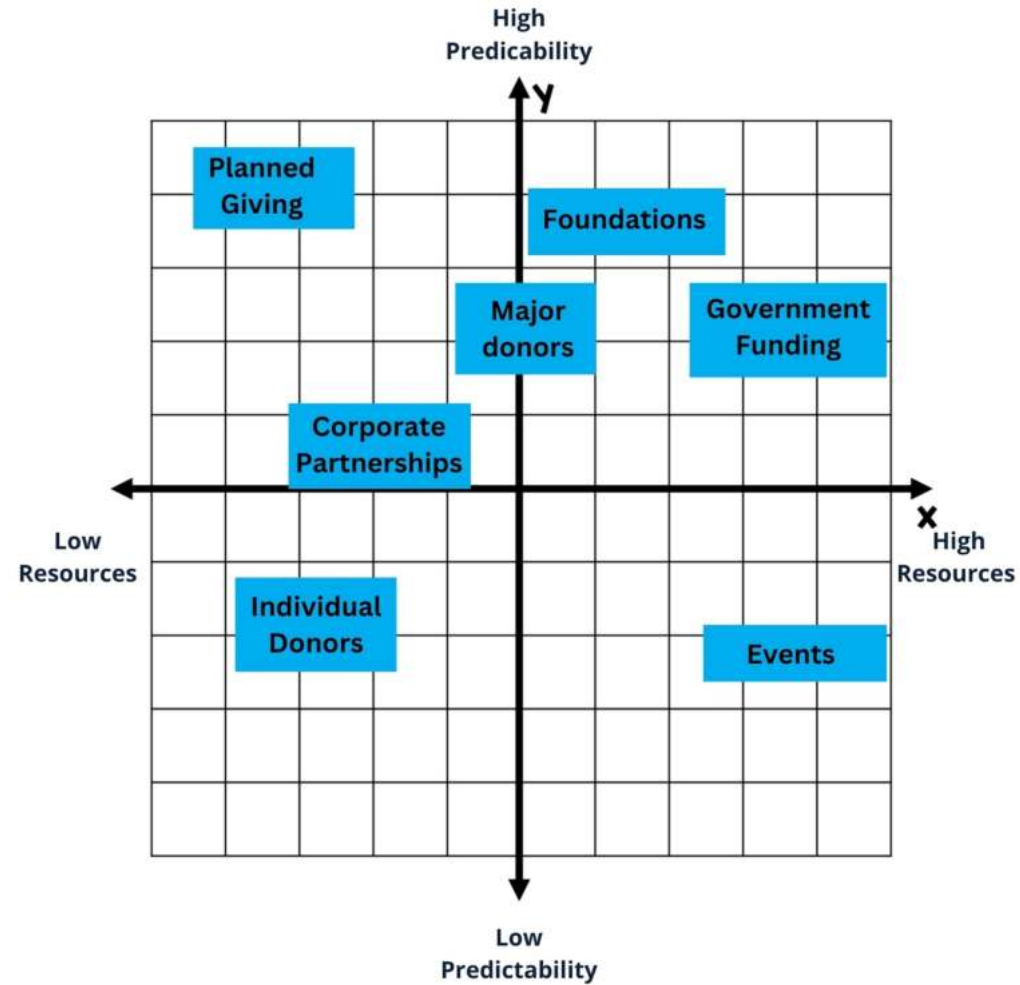
## Sale of Goods

Merchandise, publications, etc

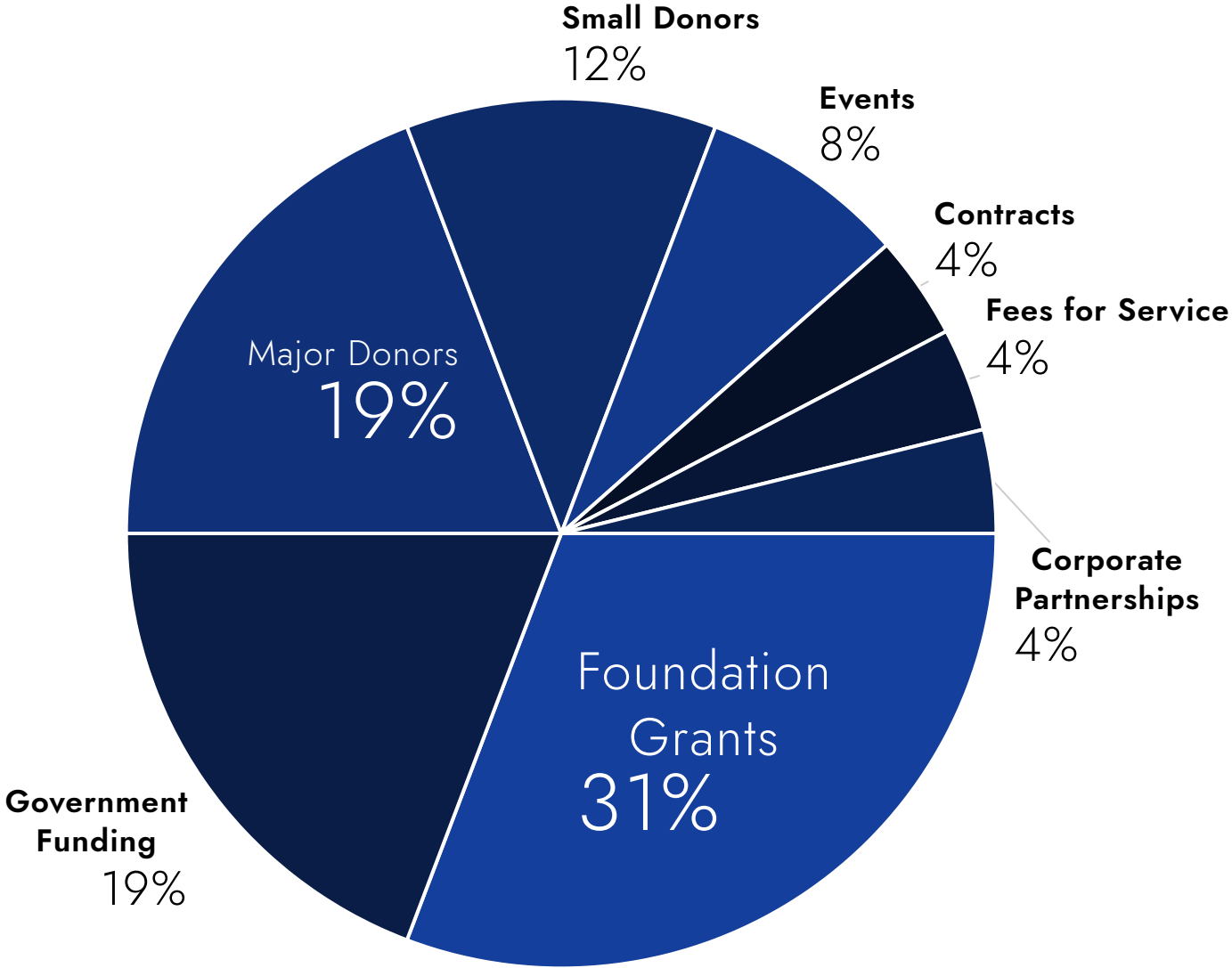
This is not an exhaustive list! Potential sources of funding span a wide range of possibilities.



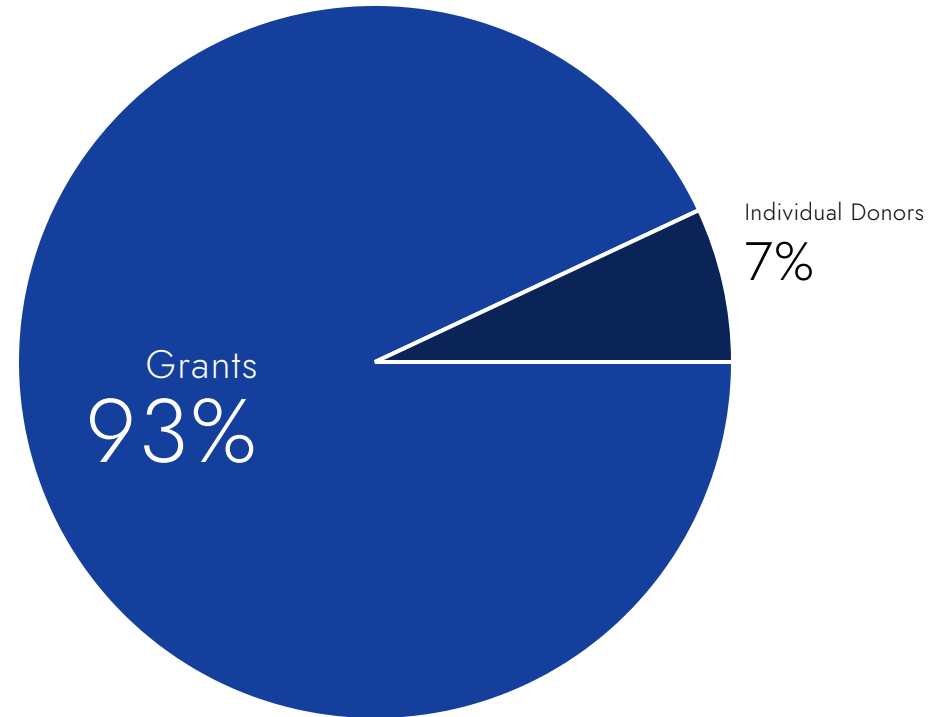
# FUNDING RESOURCES AND PREDICTABILITY



# A VERY DIVERSIFIED **FUNDING PORTFOLIO**



# WE SEE A LOT OF PORTFOLIOS **THAT LOOK LIKE THIS**



A major element of the decision-making process around an organization's funding model is prioritization around the right level of effort to assign to each funding category.



Section 3

# ALL ABOUT GRANTS

# GRANTS REAL TALK



Grants can be an impactful multi-year source of funds and serve as a solid foundation for any other fundraising you undertake.



Grants are also a high-effort undertaking with a lot of formality inherent to the process. Your organization needs to be ready for grants.



# GRANT READINESS

Evidence of a grant-ready organization

## **STRONG**

501c3 with full time staff and a formal board. Clear funding needs for 6-12 months. An identified need in the community. A mission and vision statement. Required documentation. A team member who can manage your grants approach.

## **STRONGER**

Alternative sources of funding. A history of successful programs and impactful results. Capacity to implement. Internal administrative, financial, HR, and operational controls.

## **STRONGEST**

Partnerships with other community organizations A 5-7 year strategic plan. Strong relationships with funders and an active board with an expansive network. Clear and demonstrated capacity to implement. Strong internal administrative, financial, HR, and operational controls.

# TYPES OF GRANTMAKERS



## Private or Public Foundations

Community Foundations  
Private Foundations



## Government

Federal, state, local  
Educational institutions (e.g.  
school districts)



## Corporate

Foundations  
Corporate Social  
Responsibility Grants



## International and Multilateral Organizations

e.g. UN agencies



## Other Nonprofits

Subgrants

# FOUNDATION & INSTITUTIONAL GRANTS



## Advantages

Potential for large funding amounts

Foundation backing provides legitimacy to other donors

Potential for consistent funding over time

Open, public, transparent processes

## Disadvantages

Significant staff time required

Process often needs to be repeated each year

Burden of compliance

Can be specific and restrictive



# GOVERNMENT FUNDING



## Advantages

Funding amounts are higher than many other opportunities

Information and requirements are public and accessible

Award of government funding lends credibility

Will often cover some general operating expenses/staff costs

## Disadvantages

Processes require staff resources and expertise (resource intensive)

Opportunities are competitive

Once awarded, can be difficult to adapt funding (inflexible)

Often paid as reimbursement for expenses

Political instability

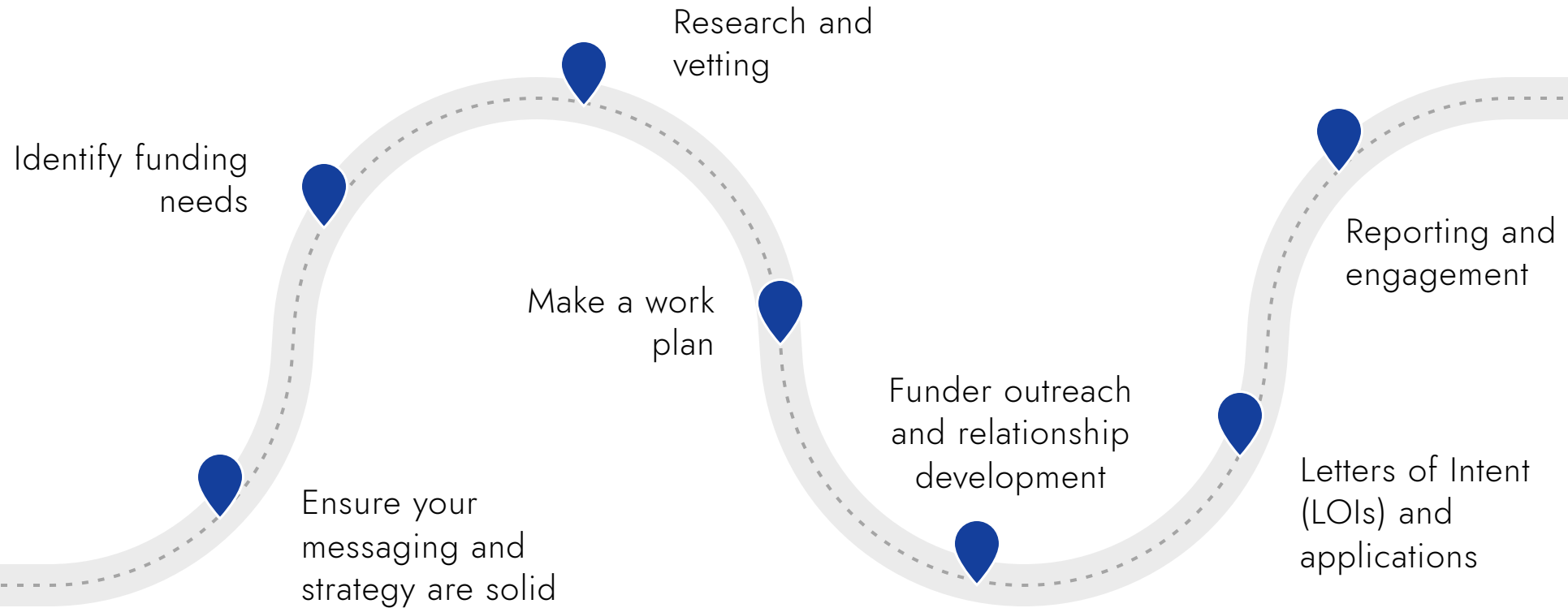
Stringent reporting and compliance requirements



Section 4

SURPRISE! IT'S NOT JUST  
ABOUT GRANTWRITING

# GRANT-SEEKING JOURNEY



# PHASE 1: DETERMINING FUNDING NEEDS



Examples:

Project/program

General operating

Capital/construction

Capacity building

Take into account both organizational requirements and funder preferences

DON'T  
FIND FUNDERS AND  
THEN CREATE A  
FUNDING NEED

DO:  
BE PROACTIVE

CREATE A  
WORK PLAN

START BY SEARCHING  
CLOSEST TO HOME

# PHASE 2: RESEARCH AND VETTING

## Compile a list of prospects

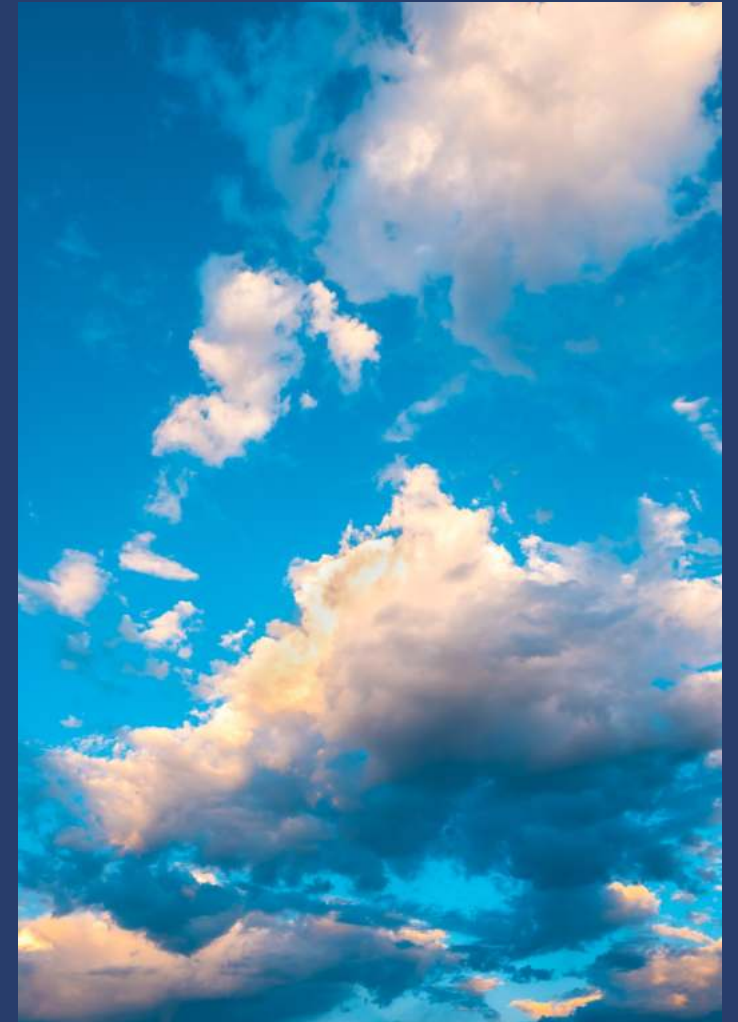
- Contract with an organization like Capacita or conduct your own research using paid databases
- Create search terms with key words from your funding needs and service location
- Look at who funds your peers

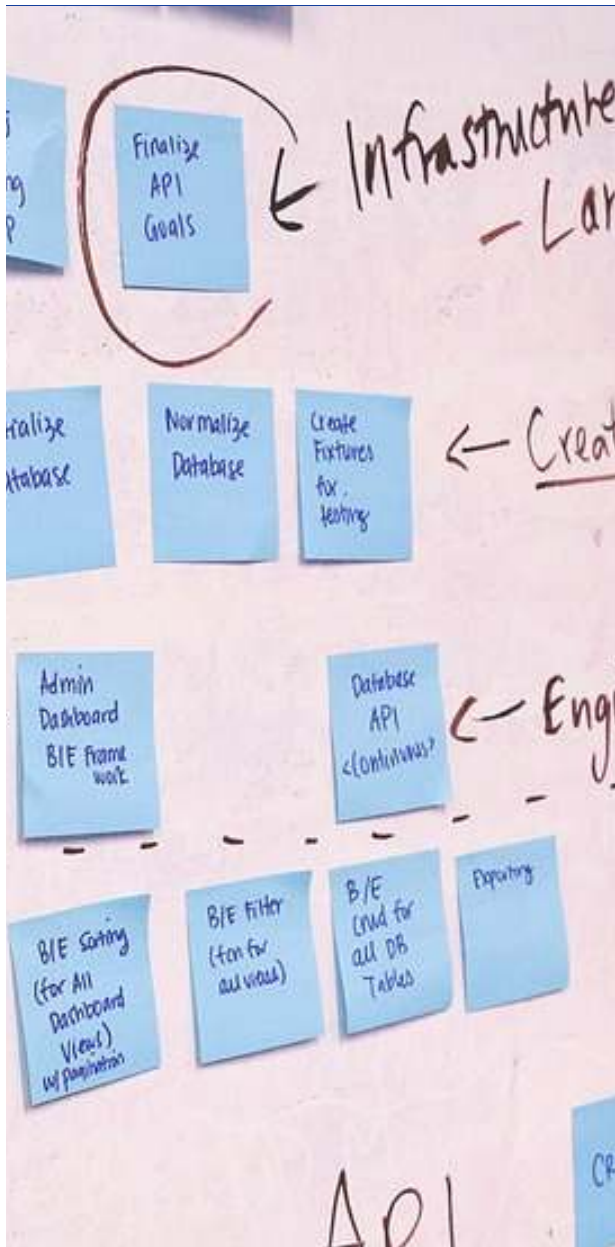
## Vet the options

- Mission/Funding priorities
- Location
- Eligibility
- Past Grantees
- Funding Range
- Deadlines
- Open opportunities

## Prioritize by:

- Best fit
- Most pressing organizational need
- Deadlines
- Organizational connections with the funder





## PHASE 3: CREATE A WORK PLAN

Create a well-structured work plan to guide your grant-seeking efforts and ensure consistent and strategic effort over the course of a year

Phase 4

# FUNDER OUTREACH





FOCUS ON GETTING YOUR  
STORY AND YOUR PITCH  
AS STRONG AS POSSIBLE.

**THEN USE YOUR NETWORK  
TO HELP DETERMINE WHO  
CARES ABOUT YOUR WORK.**

THIS IS WHO YOU WANT  
TO GET IN FRONT OF.



# **TRUST** IS THE CENTER OF THE GENEROSITY MOTIVATOR ECOSYSTEM

"I TRUST THE ORGANIZATION TO DO THE RIGHT THINGS AND USE THE MONEY WISELY"



YOUR DONORS  
NEED TO KNOW  
YOU TO TRUST YOU



WHAT DO YOU BELIEVE  
WAS THE **KEY MISSING  
PIECE** IN YOUR GRANT-  
SEEKING STRATEGY?

# FUNDER OUTREACH



Check for any connections that could lead to a warm introduction



Organize the email language and other materials you want to share with funder



Gather information on how the funder prefers to be contacted



Be prepared with background and talking points

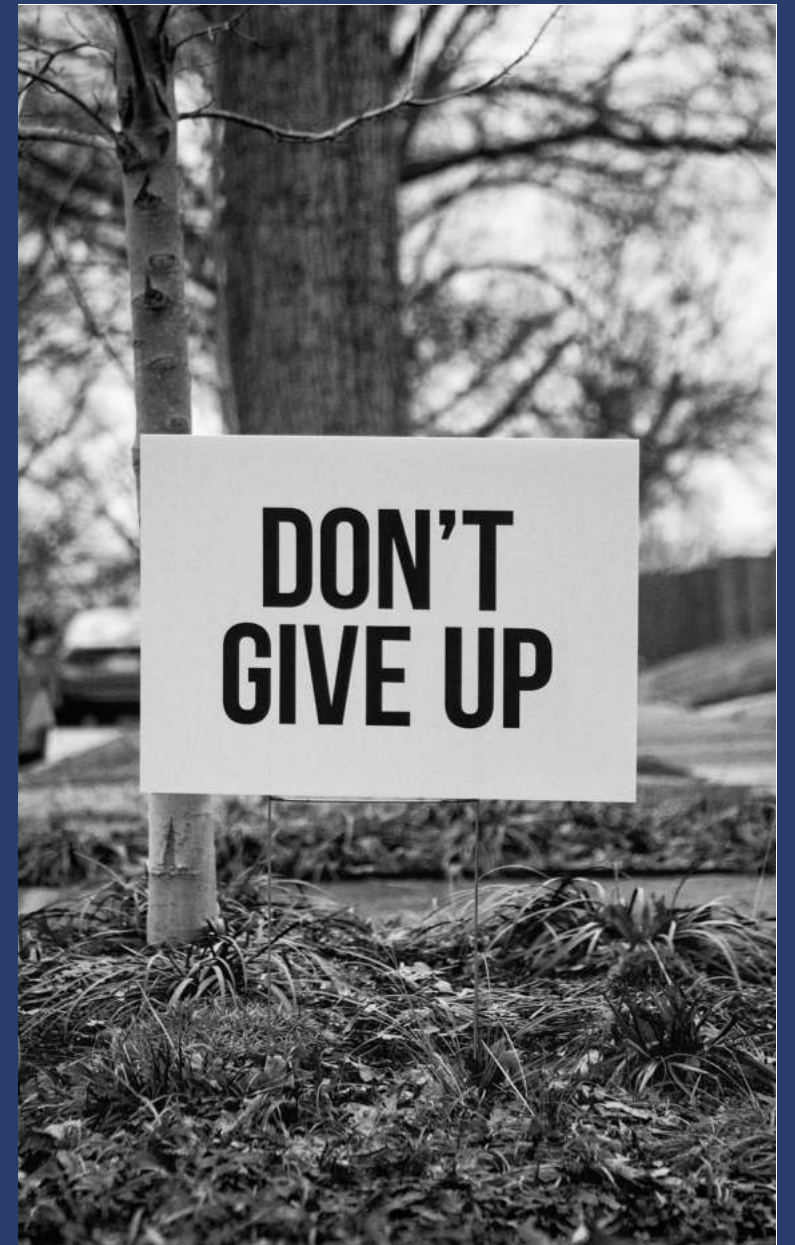


Tailor outreach to each funder

**You are far more likely to be denied by a grantmaker if you don't have a pre-existing relationship with them**

# THE POWER OF PERSISTENCE AND PERSPECTIVE

- Seeking alignment with their priorities is key
- Donors know you're going to ask for support! It's ok, it's your job as a leader to resource your organization
- Persistence and overcoming rejection: don't take it personally & just keep going
- You're planting seeds
- It's a long game! Pace yourself and plan



# PHASE 5: LETTERS OF INTENT AND APPLICATIONS



## LETTERS OF INTENT

This letter is usually a short one to three page pitch of the organization and the project

## APPLICATIONS

Longer proposals including specific questions from funders and with requirements for attached documentation

## **BE CLEAR & CONCISE**

ENSURE SOMEONE WHO DOESN'T KNOW YOUR PROGRAM OR ANYTHING ABOUT THE SECTOR CAN UNDERSTAND

PROVIDE **BOTH DATA AND STORYTELLING** TO PAINT THE WHOLE PICTURE

FOLLOW THE SAME NARRATIVE THREAD IN THE APPLICATION

**REFLECT THE FUNDER'S LANGUAGE BACK TO THEM**

DRAFT THE APPLICATION **IN A WORD OR GOOGLE DOCUMENT FIRST**

**CHECK GRAMMAR, SPELLING, AND FORMATTING!**

KEEP COMMON DOCUMENTS, DRAFTS, AND SUBMITTALS ORGANIZED

THIS MAY SEEM OBVIOUS... BUT **ANSWER ALL THE QUESTIONS!**

HAVE AN OUTSIDER REVIEW AND GIVE FEEDBACK



## PHASE 6

# **POST-AWARD REPORTING AND FUNDER ENGAGEMENT**

Keep the  
connection  
and  
relationship  
strong!

Interim and  
final reports

Appreciation  
(thank you  
notes, annual  
report,  
website)

Site visits

Event invites  
(not just your  
annual gala!)

Advisory  
committees

A high-altitude mountain landscape with snow-covered peaks and a sea of clouds. The scene is captured from an elevated perspective, showing a range of jagged, snow-capped mountains. The foreground features a steep, snow-covered slope. Below the mountain ridges, a thick layer of white clouds fills the valley, creating a 'sea of clouds' effect. The sky is a pale, hazy blue, suggesting a clear but slightly overcast day. The overall atmosphere is serene and majestic.

LEVELING UP

WORK SMART:  
PROJECT MANAGE  
YOUR APPROACH



**“THE KEY IS MAKING A FUNDRAISING  
PLAN THAT MATCHES THE ACTUAL  
FUNDING ENVIRONMENT.”**

# GRANTS CAPACITY BUILDING

You can't do everything, so concentrate on the next best step for your organization

Determine Funding Needs

Create a list

Evaluate if they are grant-appropriate

Prioritize

Frame them for funders

Research and Vetting

Compile list of prospects

Vet the list

Prioritize

Funder Outreach

Check for connections

Gather info on their contact preferences

Organize emails and materials to share

Tailor outreach to each funder

LOIs and Applications

Prioritize your list

Develop a work plan

Execute!

Post Award Reporting and Funder Engagement

Project Manage Compliance

Create engagement strategies



EFFECTIVE STRATEGY IS  
ALL ABOUT THOUGHTFUL  
RESOURCE ALLOCATION  
FOR YOUR FUNDRAISING  
EFFORTS

**Your time is one of the most effective  
resources you have.**

WE CAN HELP  
YOU FIND  
AND SECURE  
**GOOD FIT  
GRANTS**  
FOR YOUR  
ORGANIZATION



**CAPACITA**  
CONSULTING

**QUESTIONS?**



**CAPACITA**  
CONSULTING

**[Adriana@CapacitaConsulting.com](mailto:Adriana@CapacitaConsulting.com)**

[www.capacitaconsulting.com](http://www.capacitaconsulting.com)



THANK YOU

