

Refine the Art and Science of Corporate,  
Foundation & Government Relations

# Refine the Art & Science of Corporate, Foundation & Government Relations



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## Overview

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- 2 Different Types of Grant Funders
- 3 What to Know About Each Type of Grant
- 4 Tips for Finding Grants
- 5 Process to Receive Grants
- 6 Best Practices
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## Why Apply for Grants?

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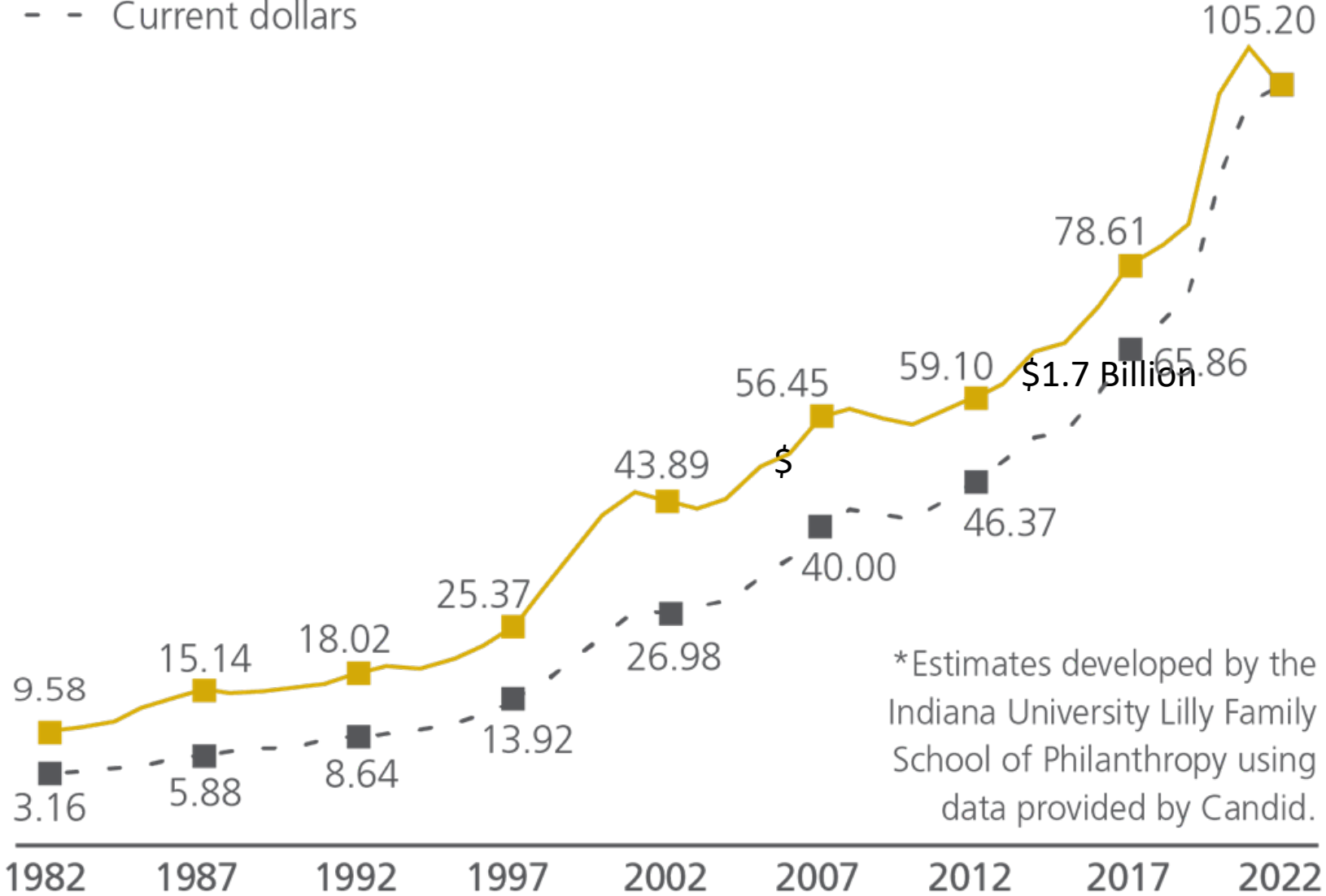
*Because Foundations are required to get money away?*

# Foundation & Corporate Giving

## Giving by foundations, 1982-2022

(in billions of dollars)

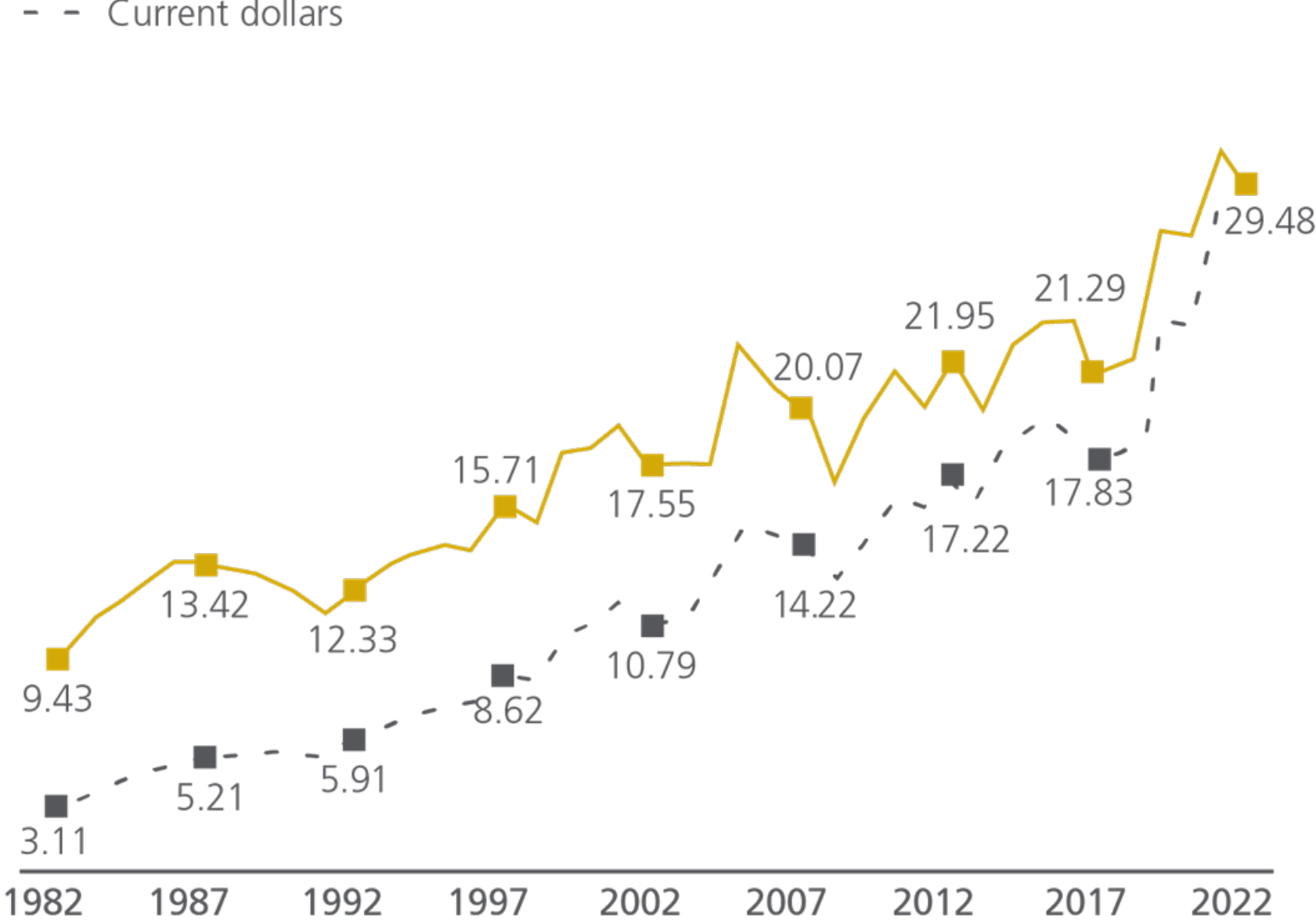
— Inflation-adjusted dollars  
 - - Current dollars



## Giving by corporations, 1982-2022

(in billions of dollars)

— Inflation-adjusted dollars  
 - - Current dollars



# Why Should you Apply for Grants?

## 1. Grants grow your organization

- Growing organizations have a range of funding needs.
- Generating support from different sources can both increase your organization's revenue and provide separate pools of funding to support various efforts within the organization.

# Why Should you Apply for Grants?

## 2. Grants Diversify Your Income Stream

- If an organization relies too heavily on one source of funding, and that source of support disappears due to the economy, competition, etc., the nonprofit can end up in dire financial straits.
- Just like balancing your 401k, having different types of income streams, including grants, can help you minimize risk.



# Why Should you Apply for Grants?

## 3. Grants Relieve Pressure

- While some grants are quite small, most awards are significantly larger than individual donations.
- Grantors often award gifts over years, which helps make more significant program-level investments over an extended period.

# Why Should you Apply for Grants?

## 4. Upside of Grants

- Grants also can get you on the right path to growing awareness and enhancing your reputation within the non-profit community. You can receive generous amounts of money.
- Once you have obtained one grant, you are more likely to receive others.
- Receiving grants is a good way to build your organization's visibility and credibility.



# Why Should you Apply for Grants?

## 4. Downside of Grants

- Grants can take a significant amount of time.
- They come with specific conditions attached.
- Grants are meant for specific short-term purposes, not to be a permanent nonprofit revenue stream.



## Different Types of Grant Funders

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*Require Different Methods and Tactics*

# Private Family Foundations

- Private family foundations are established by a family and exist to preserve family assets and to take advantage of tax breaks while pursuing their philanthropic goals.
- Over \$400 Billion Estimated to go to Crowdfunding
- Their mission is always aligned with the donors' values.

# Corporate Foundations

- Corporate Foundations are philanthropic organizations created as separate entities from their parent companies, which fund their activities.
- They often choose to fund projects within the communities in which they conduct business.



# Public Foundations & Community Foundations

- Public Foundations have a public charity status and represent the public interest.
- Usually, they derive their funding from a variety of public sources rather than one type of source.
- A Community Foundation is a public foundation where local families have contributed to pool their financial resources to benefit the nonprofit sector of the community.

# Government Funding

- Government funding, which is sourced at all levels of government-federal, state, and local-can be the easiest source for general operating support as opposed to program/project funding.
- However, government funding requires bureaucratic paperwork and complex processes aimed at selecting the most promising and compliant organizations.



## What to Know About Each Type of Grant

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*What are the Parameters?*

# Program/Project Grants

- Program grants are funds disbursed for programs or projects that have specific, restricted, clearly described applications.
- Each program or project should have its own goals, proposed staff, clearly outlined activities, expected outcomes, and line-item budget.



# General Operating Grants

- General operating grants support the organizations' mission instead of a specific program.
- Funds are provided to run the business of the nonprofit, for instance the received money might be used for rent, payroll, utilities, internet, marketing, technology infrastructure, fundraising development.

# Grants for Capital Funding

- Capital funds are offered to support a variety of activities aimed at raising capital.
- Nonprofits, for example, may seek capital support for construction or purchase of a new building or equipment, or other large projects.

# Research Grants

- Many health-oriented foundations provide research grants, generally awarded to academics, scientists, and other researchers working on particular health and wellness-related issues.
- Frequently, research grants will be payable to the institution, such as a university or hospital where the researcher is affiliated.

# Matching Grants

- Foundations of all varieties provide matching grants
  - Commit to a particular amount of grant money provided that the nonprofit can raise an equal amount of money from other sources.



# In-Kind Grant Contributions

- Many corporations and foundations offer in-kind grants to provide assistance in the form of non-monetary support.
  - Oftentimes these are donations or services or goods that might be used towards a specific program.

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## Tips for Finding Grants

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*How to prepare for the right opportunities*

# Establish a Budget for The Grant Money

- The first step is to outline the project you need funding for and then determine the exact amount you need.
- What are the details of the project/expense? Why is it necessary for your organization to continue your work?
- Outline all costs associated with the project, including staff time, services, other administrative costs, supplies, travel, etc.

# Research Resources

- The key is finding grants that match the unique needs of your organization
- The best place to start is right within your local community.
- From there, extend your search outwards. There are a large number of stellar grant search engines available online that will give you access to both foundation and government grants.

# Match The Grant Criteria

- Make sure you meet every stipulation of the grant criteria and take the time to determine if you qualify.
- The short amount of time you put into finding the right grant for your nonprofit could save you a lot of time and money down the road.
- For program development and to expand the services your charity provides, focus your attention on program expenses.



# Have Your Documents in Place

- Funding agencies ask for varying documents, depending on the type of grant you are looking for and the grantor's criteria.
- There are some documents that you'll need to submit with almost every grant.

# Documents and Information to Have Ready (part 1/4)

- Your organization's history and mission
- A description of your target population, their needs, and the services that you provide to meet those needs
- A statement explaining how your programs are distinct from other programs and services serving your target population
- Major accomplishments to date

# Documents and Information to Have Ready (part 2/4)

- Challenges and lessons learned with the program to date
- Expected accomplishments with the funding you are trying to raise
- Explanation on how you will evaluate progress

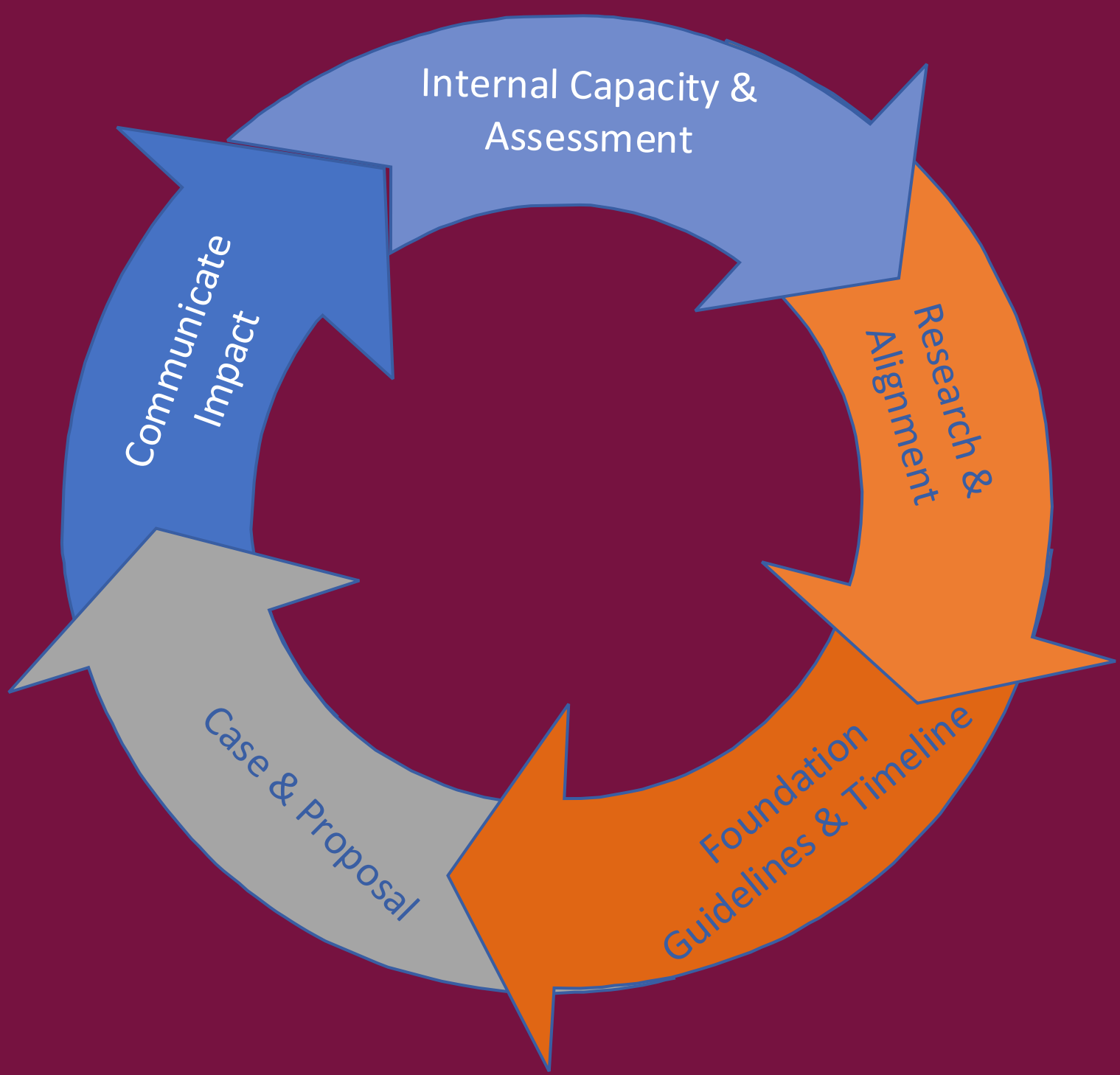
# Documents and Information to Have Ready (part 3/4)

- Staff and team leader resumes or biographies, including senior leadership of the organization, board members, and the key staff who deliver the program whose activities you are trying to support
- Other organizations you work with to address the issue
- Additional attachments such as a 501(c)(3) letter and an annual report

# Documents and Information to Have Ready (part 4/4)

- Financial information, including audited financials, a budget for the proposed program, a budget narrative explaining how you plan to use the grant funds, a list of other funders, and tax forms, including a Form 990
- A program sustainability plan with information on how the program will continue if
  - a) it is not funded by a given foundation
  - b) after one year of foundation funding





# Process to Receive Grants

*How to Enhance Your Readiness*

# Step One: Are you grants ready?

- First, you need to verify if your organization is technically ready to apply for grants – “readiness”
- There are many grant readiness assessment tools available, mainly in the form of a checklist that will assess your readiness (in terms of eligibility, program detail, leadership, impact, community relationship, strategic planning).

## Step Two: Know your “why” and be clear

- Your success in grant funding heavily depends on your ability to find the right match for your nonprofit.
- If you are looking for funds to support your program, make an internal assessment to clarify why your services are so needed in the community for the population you serve and be ready to make your case supported by data and relevant information.

# Step Three: Do your research

- Funders have their own set of guidelines and requirements and specific templates for applications.
- Make sure you find the funders in alignment with your vision and mission – chasing money will never work.
- Pay attention to funders' guidelines, which tell you what they fund and do not fund; the range of monies they grant; eligibility criteria; how to apply, and submission deadlines as well as contact information.

# Step Four: Create your prospects list and grant calendar

- Compile your research in a clear document that records the main information related to the funders: their eligibility criteria (Who do they fund? Where? Which activities?), their mission, required documentation to be attached to the proposal, other requirements (partnerships?), and their deadlines.
- Creating a grant calendar with a clear indication of which grants to submit and when throughout the year will assist you in achieving your financial goals.



# Step Five: Reach out and create a relationship

- Many funders will greatly appreciate you giving them a call to verify if you are a good fit for them.
- They love to give money away to support the causes they care for.
- Government grants tend to be very complex: ask questions when in doubt.
- Don't be shy and don't underestimate the power of authentic and meaningful connections.

## Step Six: Craft your proposal (part 1/3)

- Craft your proposal making your case through a strong statement of need and a detailed program description.
- If the funder provides an online application, review it, and get the information requested before filling it out.
- In other cases, the funder requires a letter of interest or inquiry, and you must provide exactly what they request.

## Step Six: Craft your proposal (part 2/3)

- Sometimes the funder requires only a one-page proposal summary (write one page, no more!).
- Sometimes, they want a full proposal: thoroughly follow the requirements of the grant you are applying for (eligibility, physical/geographic location, required documentation, formatting requirements, deadline).

## Step Six: Craft your proposal (part 3/3)

- Show the impact your program can make, your organizational ability, and how you will measure your performance throughout the life of the project.
- Do not forget to showcase your past outcomes, if any.
- Results achieved in past programs will boost your chances to get awarded.
- Have someone review the proposal to make sure your proposal is strong, compelling, and in compliance.

## Step Seven: You got the award, now what?

- Make sure you keep in contact with your funder and always submit the required reports in a timely manner.
- If for any reason, you encounter unexpected challenges in your program implementation that may impact performance or projected outcomes, make sure you let the funder know on time.
- In most cases, they will adjust expectations accordingly if you are in good faith and be glad you reached out.





## Best Practices

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*What are successful models and strategies*

# Research Grantmakers

- Find out the prospect funder's giving history.
- Research who are the grantmaker's board members and senior leaders in case they are connected with your organization's leaders and key supporters.
- These types of introductions are the most effective way of getting the foundation's attention.
- The more you know about your funding prospect, the better you can tailor your proposal to their passion.

# Build Relationships

- After you have researched your prospects, reach out.
- Make sure to follow the funder's contact instructions.
- Use your research and be ready with talking points – show that you have spent time learning about them.
- Your research means you can ask deeper, detailed questions, beyond what's readily available online.
- That's a better use of time for both you and the funder and also makes for a better first impression.

# Funders That Do Not Accept Applications (part 1/2)

- You will probably come across some funders that are good matches for your work but do not accept unsolicited proposals.
- You should still approach them.
- If you do not have personal connections, send a letter that introduces your organization.

# Funders That Do Not Accept Applications (part 2/2)

- Explain how your organization connects with the foundation's giving interests
- Do NOT ask for money
- Ask how the foundation selects who receives its grants
- Ask if you can meet with them or give them more information about your organization



## Sustainability

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*How do you build a strong, long pipeline?*



# Think About the Future

- Learn to see grants as a booster shot
- There are also ethical implications
- Be strategic and not tactical
- Replicate best-practice models
  - NCLR/Unidos US
  - United Way Worldwide
- Learn to be a great storyteller
- Implement a model stewardship program



# QUESTIONS?





Thank You

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