

Demystifying Philanthropy:

How Foundations Operate

February 2026

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Demystifying Philanthropy

Overview of the Funding Landscape (Non-Federal)

Community
Foundations

Private
Foundations
(Family, Corporate,
Independent)

Corporate
Giving
Programs

Individual
Donors

Donor
Advised
Funds
(DAFs)

Giving
Circles

United
Ways

Healthcare
Conversion
Foundations

Philanthropy Serving Organizations (“Gatekeepers”)

Regional
Associations of
Grantmakers
(unitedphilforum.org)

Affinity Groups
Cof.org/organization-
type/affinity-group

Multi-Family
Offices (search in your
local area)

Wealth / Estate /
Philanthropy Advisory
Firms
(search local)

Current Trends in Philanthropy

The Good News:

- Universal deduction returns – a win for everyday donors!
- Planned and legacy giving stay strong

The Bad News:

- Cap on charitable donations at 35% for high-income tax payers
- New 1% “floor” that will affect small and mid-size business giving

Other Trends:

- Rapid-response funds on the rise for safety net programs
- Swing away from general operating support (project support an entry point)
- Responding to political threats: Some are de-emphasizing DEI funding / others “unite in advance” to assert philanthropy’s freedom to give / increasing security

Grantmaker Databases

Candid Foundation Directory – \$100/month OR access for free at county library (\$1M or less orgs can also access for free)– filter by mission area and geography – lists 300,000 grantmakers

Instrumentl – \$299-499/month / try free for 14 days – one unified workspace for grant seeking lifecycle (prospecting, grant writing, applying, following up) - has AI assist for grantwriting

Grantstation - \$199 for 1 year – lists 150,000 funders

Inside Philanthropy - \$47/mo – 7,000 grantmakers

Grant Assist AI – nonprofits.freewill.com – AI grantwriting software and fundraising solutions

Your Funding Toolkit: Start this Week

1

Find Your Community Foundation

[Communityfoundationlocator.org](https://www.communityfoundationlocator.org) → Call them directly → They want to hear from local nonprofits → Ask about current funding priorities / how your org can be recipient of donor advised funds / bequests → Position yourself as a resource / expert on community resilience

2

Search Foundation Databases

Filter by mission and geography → Study past grantees / reach out to these grantees to gain intros or insights → Tailor your message to what's motivating for funders: "Your company's leadership sets the standard for community generosity," or "You are creating a lasting impact where all community members can thrive with safety."

3

Reach out to Regional Grantmaker Networks

Find your local Regional Association of Grantmakers → Attend networking events → Position your org as a resource/speaker at upcoming panels/conferences: "we can provide your members on-the-ground insight and expertise into issues affecting our community"

4

Start a Campaign for Individual Donors

Start or bolster your mailing list → Share the story of their gift as community belonging, meeting urgency, and changing lives → Inform non-itemizers about the new tax savings for charitable donations ("your gift is both impactful AND financially smart")

Working with Foundations – Keys for Success

Suggested Do's and Don'ts

- If their website says send a letter of inquiry, send a letter of inquiry! Don't send an application.
- If their website says "do not call," call anyway. You work hard. You deserve respect. They can always not take your call or not call you back.
- Sound Confident. DO NOT APOLOGIZE for the good work you do.
- Do not start with, "I know this is not what you fund, but..." The Kiss of Death! Introduce yourself. You might say, "I know you fund work in this area, I wanted to tell you a little bit about our work if you have a minute." Believe me, they have a minute!
- Make it brief. Don't give your organization's whole life history. Ask whether there's anything else the foundation would like to know about your organization.
- Offer to follow up with just a few materials. Don't send everything you've ever produced! Send the most informative or visually interesting piece of information that most closely parallels the foundation's mission. Pique their curiosity.
- Ask for input. Program Officers love to tell you how to conduct your business! It also gives them a chance to learn more about you, or to share what they've learned from organizations like yours.
- Don't tell the foundation what they should be funding. You might ask whether they'd ever considered funding a certain activity or in a certain geographic area. Mission alignment is key, but you may be able to influence their thinking. It may take a couple of years for the idea to sink in, but it's worth planting the seed.
- Ask if you can check back next year or sooner. Most times you'll get a yes.
- Try not to write or call soon after the posted deadline for applications. That's when most program staff tend to be swamped. Your letter might get lost.

Source: "Working with Foundations: Keys to Success" – Bob Canace, Program Officer, Peter and Carmen Lucia Buck Foundation

Project Description Worksheet

Preparing to Research Potential Grantmakers

Project:

Lead Staff Person:

Date

1.The Community Need:

2.Project Description:

3.Relationship to past projects:

4.Budget Summary (list large line items):

5.Total budget for this project is: \$

6.Specific line items include:

7.Identify key search terms; areas of interest; which funder categories might this project fall into – think of as many as possible

8. What is the geographic focus of this project (if any)?

9. What type of support do we need for this project? General operating? Project only? Capital-for building or renovation (this is tough one for most staffed foundations)

Sample Foundation Outreach Email Template

**These emails are examples only. Customize based on your organization's mission / services and alignment with your funder prospect's priorities. Use AI tools as needed to create better funder letters, email campaigns, and other outreach.*

EMAIL TEMPLATE 1: Community Foundation Initial Outreach

SUBJECT LINE: [Your Organization Name] - Partnering to Address Community Safety Crisis

Dear [Foundation Program Officer Name],

I'm reaching out because [Your Organization Name] is working on a critical public health and safety issue in [Your Community], and I believe our work aligns closely with [Foundation Name]'s commitment to [mention their specific priority - community health, safety, youth development, etc.].

Most people don't know this, but [violence] is now the number one killer of women and children in America. And the root causes—family violence, sexual assault, and adverse childhood experiences—affect far more of our community than many realize. One in four people experience family violence, and one in seven experience sexual assault in their lifetime.

What do these statistics show? That almost *everyone* is a victim, or knows one. And yet, many donors don't yet understand how disrupting victimization prevents further crime, harm, and builds resilience in communities.

For [X] years, [Your Organization Name] has been preventing these cycles of violence through [brief description of your work]. We work in close partnership with [local law enforcement agency], [hospital/health system], and [school district] to identify at-risk families early and provide evidence-based interventions that stop violence before it escalates.

Our impact includes:

- [Specific metric: e.g., "Served 45 families last year, with 89% reporting no repeat incidents"]
- [Community outcome: e.g., "Reduced repeat 911 calls by 40% among participating families"]
- [Prevention metric: e.g., "Provided trauma-informed support to 200 children, preventing long-term ACEs"]

With recent federal funding cuts, we're diversifying our revenue to ensure this critical work continues. I would welcome a 15-minute conversation to learn more about [Foundation Name]'s current priorities and explore whether our community safety and resilience work might align with your grantmaking.

Would you have time for a brief call in the next few weeks? Thank you for your consideration and for [Foundation Name]'s commitment to our community.

Warmly,

[Your Name] [Your Title] [Your Organization] [Phone] [Email]

EMAIL TEMPLATE 2: Family Foundation (More Personal Approach)

SUBJECT LINE: Creating Safer Communities in [Your City/County]

Dear [Trustee/Board Member Name],

I hope this email finds you well. I'm writing to introduce you to the work [Your Organization Name] is doing to address what has become a critical community health crisis here in [Your Community].

Here's something that surprised me when I first learned it: adverse childhood experiences—including exposure to family violence—are one of the strongest predictors of chronic health problems, mental illness, and even early death. These experiences literally change brain development in children.

One in four people in our community will experience family violence. One in seven will experience sexual assault. And gun violence is now the leading cause of death for children in America. These aren't just victim services issues—they're public health emergencies that affect our entire community's wellbeing and economic vitality.

[Your Organization Name] supports [enter mission / program area goal that is in alignment with what you do]. When a family calls our 24/7 crisis line or law enforcement refers a case to us, we provide:

- Immediate safety planning and crisis intervention
- Evidence-based trauma counseling that prevents long-term adverse childhood experiences
- Support navigating protective orders and the legal system
- Connection to housing, employment, and healthcare resources

Last year alone:

- [Impact stat: e.g., "We served 100 survivors and their children"]
- [Prevention stat: e.g., "89% of families we served reported no repeat violence incidents"]

- [Systems stat: e.g., "Prosecutors successfully obtained protective orders in 92% of cases where our advocates assisted"]

Recent federal funding disruptions have created uncertainty for organizations like ours that have historically relied on government grants. We're proactively building relationships with local funders who understand that preventing and intervening in violence is an investment in community health and wellbeing.

I would be grateful for the opportunity to share more about our work and learn about [Foundation Name]'s philanthropic priorities. Would you be open to a brief conversation in the coming weeks?

Thank you for your family's commitment to making [Your Community] stronger.

With appreciation,

[Your Name] [Your Title] [Your Organization] [Phone] [Email]

EMAIL TEMPLATE 3: Health-Focused Foundation

SUBJECT LINE: Addressing Adverse Childhood Experiences Through Violence Prevention

Dear [Program Officer Name],

I'm reaching out because [Your Organization Name]'s violence prevention work directly addresses one of the most significant drivers of poor health outcomes in [Your Community]: [enter description here from foundation's website].

Children who experience or witness violence are at dramatically higher risk for heart disease, diabetes, depression, substance abuse, and early death. And the statistics in our community are sobering:

- 1 in 4 people will experience family violence
- 1 in 7 will experience sexual assault
- Gun violence is now the #1 killer of children in the U.S.

[Your Organization Name] works at the intersection of public health and public safety. In partnership with [hospital/health system], [law enforcement], and [school district], we provide early intervention services that prevent ACEs and their long-term health consequences.

Our health-focused outcomes include:

- [Mental health metric: e.g., "78% of participants showed decreased PTSD symptoms after our trauma counseling program"]
- [Prevention metric: e.g., "Provided evidence-based support to 245 children, preventing documented ACEs"]
- [Systems integration: e.g., "Embedded advocates in [Hospital Name] ER to connect assault survivors with immediate support"]

Our work reduces healthcare costs, prevents chronic disease, and improves community health equity—but recent federal funding cuts threaten our capacity to continue this critical prevention work.

I would welcome the opportunity to discuss how [Your Organization Name]'s evidence-based approach to violence prevention aligns with [Foundation Name]'s health equity priorities.

Would you have 15-20 minutes for a conversation in the next few weeks?

Thank you for considering this partnership.

Best regards,

[Your Name] [Your Title] [Your Organization] [Phone] [Email]

EMAIL TEMPLATE 4: Follow-Up After Initial Contact

SUBJECT LINE: Following Up: [Your Organization] Community Safety Partnership

Hi [Name],

I wanted to follow up on my email from [date] about [Your Organization Name]'s work preventing violence and addressing adverse childhood experiences in [Your Community].

I understand foundation staff are incredibly busy, especially this time of year. If now isn't the right time for a conversation, I'd be happy to:

- Send you our most recent impact report
- Share a one-page overview of our community partnerships
- Connect in [specific timeframe, e.g., "early next quarter"]

I'm also curious whether [Foundation Name] has any upcoming grant cycles or information sessions where I could learn more about your current priorities. We want to ensure any future proposal we submit is genuinely aligned with your mission.

Thank you again for your time and for [Foundation Name]'s investment in our community.

Best,

[Your Name] [Phone]

KEY MESSAGING DO'S AND DON'TS

DO:

- Lead with public health/safety framing ("community health crisis," "public safety emergency")
- Use "Most people don't know this, but..." to share surprising statistics
- Connect your work to long-term health outcomes
- Show systems-level impact, not just individual services
- Be specific about your community ("here in [County]" not "nationally")
- Keep initial emails under 300 words
- Include 2-3 concrete impact metrics
- Ask for a conversation

DON'T:

- Start with "We're a victim services organization"
 - Use jargon like "survivor-centered" or "trauma-informed" without context
 - Focus only on crisis services without prevention framing
 - Lead with the current funding crisis (mention it briefly in context of diversifying funding sources)
 - Send a generic template without researching the foundation's priorities
 - Attach files in the initial email
 - Ask for a specific dollar amount before building relationship
-

CUSTOMIZATION CHECKLIST

Before sending, customize each email with:

- Foundation program officer's correct name and title
- Specific foundation priority area you're connecting to
- Your community's name (city/county/region)
- Your partnership organizations in community (police dept, hospital, schools)
- Your real impact metrics from the past 12 months

- Your organization's specific services (beyond the template language)
 - Foundation's name (do a find/replace to avoid errors)
 - Your complete signature with all contact information
-

RESEARCH BEFORE YOU SEND

For each foundation, check:

1. **Their website** - What are their stated priorities? Do they mention health, safety, children, families?
2. **Their 990-PF form** (private foundations) - Who have they funded recently? What issue areas?
3. **Their grantee list** - Have they funded similar organizations? In your geography?
4. **Their application process** - Do they accept unsolicited inquiries? Is there a specific submission process?
5. **Their timeline** - When are their grant deadlines? When do they make decisions?

Then tailor your email to demonstrate you've done your homework.

WHAT TO EXPECT

Best case scenario: They respond within a week, invite you for a call, and ask for more information.

Second best scenario: They respond within 2-3 weeks, suggest you submit a letter of inquiry through their formal process, or invite you to an upcoming grantmaker information session.

If no response after 2 weeks: Send a brief, friendly follow-up. If still no response after 4 weeks, move on. Not every foundation will be a fit, and that's okay. You can circle back to them in 1-2 years.

Remember: You're starting a relationship, not making a one-time ask. Even if this foundation isn't the right fit right now, they may connect you to others or consider you in the future.

NEXT STEPS AFTER THEY RESPOND

If they invite you for a call:

- Prepare 2-3 questions about their priorities
- Have your impact data ready
- Be ready to discuss your theory of change
- Ask about their application process and timeline
- Send a thank-you email within 24 hours

If they ask for materials:

- Send only what they request (don't overwhelm)
- Follow their format requirements exactly
- Include a brief cover note referencing your conversation
- Follow up 1-2 weeks after sending

If they refer you elsewhere:

- Thank them for the connection
- Ask if you can use their name when reaching out
- Follow up with the new contact promptly
- Keep them updated on the outcome

Building foundation relationships takes time. Start with 5-10 foundations and build from there.

7 Ways to Earn Foundations' Trust and Win General Operating Support

Three experts explain how to get to know foundation program officers and best position your nonprofit to secure flexible funding.

By [M.J. Prest](#)

MAY 12, 2025

GETTY IMAGES

With the Trump administration's [freezing of billions of dollars](#) in federal funding to nonprofits and economic uncertainty increasing, at no time since the pandemic have more charities urgently needed the type of security that unrestricted grants provide.

Finding these opportunities requires a longer-term strategy than targeting project grants because you need to develop trust with your funder. Once you've earned that faith, an unrestricted grant is both a safety net and a vote of confidence in your work — and during turbulent times, both are sorely needed.

General operating support gives nonprofit leaders “the flexibility to keep their lights on and keep their programs running, and they get to decide what that looks like,” says Sophy Yem, senior program officer for philanthropy at the [Surdna Foundation](#).

The *Chronicle* spoke with Yem and two other experts to learn how grant seekers can meet program officers and best position themselves to secure flexible funding. Here are their top tips.

Attend the Right Events

At the Surdna Foundation, general operating grants made up 78 percent of its \$47 million in grant making over the last fiscal year, says Yem. However, like many grant makers, Surdna doesn't accept unsolicited proposals. When that's the case with a potential funder, you'll have to work at boosting your group's profile in your mission area if you want to be invited to apply, she says.

Funder briefings and convenings of grantees are typically private, but if one of your grant makers is hosting or attending a conference, find out what other foundations will be there, Yem advises. Then ask the program officer how you can apply to be a speaker during a panel or session there: "It's how you get visibility with other funders."

Foundations that attend cause-specific conferences will do so only if they are prepared to give to groups working on that issue, so regularly review what networking events are scheduled in your field or geographic area, advises Tonia Brown-Kinzel, grant-compliance manager at the [Grant Plant](#), a consulting group that helps nonprofits secure and manage grants.

She recommends looking at the websites of [state-based foundation associations](#) and nonprofit training organizations for events open to the public or grant seekers. Use those opportunities to connect with program officers, says Brown-Kinzel.

Then be prepared to talk up your organization's successes. "It's not only important to be there at those events but to establish yourself as a thought leader. You can't be a wallflower," she says. "It's not bragging, it's advocating. It's important you're putting your story out there."

Thaw Out Your Cold Calls

When you don't have the resources to attend or speak at every conference, cold outreach can still be successful, says Anne Musial, chief development officer at [The 19th](#), a nonprofit newsroom that covers issues related to gender, politics, and policy. "Just try to defrost as much as possible," says Musial, who reports that general operating grants made up 47 percent of her group's total revenue last year.

When you've identified a foundation that makes general operating grants, search its website or LinkedIn profile to find the program officers who focus on your mission area, and reach out to them. "Funders are happy to have conversations and want to know what's going on in the field," she says. "Follow up with brief emails of little highlights to keep your organization top-of-mind when the next funding cycle comes around."

Expect at least six months and up to a year of relationship-building before you might be invited to apply for an unrestricted grant.

Second, you should ask your board members to introduce you to private or [corporate foundations](#) where they have connections, which makes a funder more likely to take your call.

Finally, Musial views peer organizations as resources, not competition. When she meets other fundraisers in journalism who have been successful in getting unrestricted support, she'll ask for a 30-minute Zoom call to share what's working. Sometimes that leads to referrals to the program officers they've been working with, she says.

Build Rapport With Program Officers

Once you've connected with a program officer, nurture that connection over time to build trust with the funder. Brown-Kinzel says to expect at least six months and up to a year of relationship-building before you might be invited to apply for an unrestricted grant.

She shares media hits about the organization's work — whether organic news coverage, paid media, or social media — to stay connected with program officers and keep them up to date.

Groups that work hard to draw attention to their track record of success in their mission area are best positioned to get on a foundation's short list. Program officers are checking that your group has the ability to do meaningful work on an issue the funder cares about, she says: "You can have a charismatic leader, but if you don't have the capacity to use a million dollars, then they need to know you will know what to do with it."

Also, because not every grant maker has a staff of program officers, Brown-Kinzel stays in touch with people who have the right connections to invite her to apply: "Make friends with wealth managers and advisers to donor-advised funds. Network with them, let them know what you're doing, and they may in turn start that conversation."

Be Clear on Alignment

Before you submit your proposal, be totally clear on what makes your nonprofit a good partner for the foundation and what values the organizations share.

The 19th doesn't limit itself to foundations that make grants to journalism groups, Musial says. She thinks more broadly about the issues they cover to find areas of alignment outside of the news box: "We report on climate, reproductive health, caregiving, and education, so we reach out to funders who fund in those spaces." Some program officers reply that they have the budget only for direct services, but others have given them operating grants for covering those issues, she says.

Yem agrees that alignment is the most important aspect of your pitch to nail down. "To get on our radar is to know someone that we know, and to make sure that the work is aligned. If there is no alignment, then I wouldn't try," she says.

For example, an arts group applying for a grant from an environmental program without showing that there is any overlap would be an automatic no, she says, as would be a proposal to use a grant for lobbying or other prohibited activities.

If you're told it's not the right time in the funding cycle, you can always apply again later, but listen carefully when it's not a good fit, Yem says: "Accept the first no, and don't keep going for it."

Perfect Your Pitch

In your proposal, Brown-Kinzel recommends using reflective language to restate what the foundation identifies as its priorities on its website. “Mirror back their own language to them to show, this is the alignment,” she says.

The ideal proposal will show that you will spend some of an unrestricted grant right away for immediate impact, use some of it for strategic growth, and reserve some of it for a rainy day.

For a general operating grant, you don’t have to talk about goals and objectives in the way you would in a proposal for a program grant, but that doesn’t mean you can ignore outcomes entirely.

Describe what operating support will mean to your group so that the grant maker knows how you plan to grow, she says. “In some way, define what are the overall goals and objectives that are tied to your mission,” Brown-Kinzel says. “What can you achieve on an annual basis that the funder can expect they can be a part of?”

According to her, the ideal proposal will show that you will spend some of an unrestricted grant right away for immediate impact, use some of it for strategic growth, and reserve some of it for a rainy day.

Musial uses storytelling to highlight the successes The 19th has had in the five years since it was founded: “We tell our story of launching in the pandemic with 20 staff and a couple hundred thousand in the bank” to now, with 54 employees across 20 states.

Focusing on the vision of your leadership makes funders feel more comfortable with entrusting you with unrestricted support, she says. “We built this

organization from the ground up, and it shows a lot of competence in our leaders.”

Pick the Best Moment

Yem says the Surdna Foundation does not hesitate in giving general operating support right off the bat to a new grantee, but organizations that have previously received project support are already trusted entities. That makes them well suited to ask for an unrestricted grant next. “If a grant comes up for renewal, and it’s aligned, then it can turn into general operating support,” she says.

Brown-Kinzel advises that the beginning of your fiscal year is the best time to apply for a general operating grant because it takes much of the financial pressure off your group to know you can cover your payroll and expenses. “You can spend it on the core functions that keep you up and running. Or it could be applied to a gap that occurs. It’s always good to know where your money is coming from.”

You should also know your funders’ fiscal calendars, Brown-Kinzel says. She finds grant makers are more likely to approve a proposal and give a larger grant at the beginning of their fiscal year, so keep track of those dates and time your proposals accordingly.

Plan for the Future

Finally, the experts say you can best demonstrate that your nonprofit will be a good steward of unrestricted support by being honest and transparent about the organization’s future.

You can acknowledge how important receiving operating support is at this moment while making it clear you have a plan to navigate troubled waters.

During times when your group is facing hardship, Brown-Kinzel says, you can acknowledge how important receiving operating support is at that moment while making it clear you have a plan to navigate troubled waters. For example, if you relied heavily on federal grants that are now frozen, you can frame the situation as a unique event that is not the result of poor planning: “You not only want to demonstrate that you are usually financially stable, but that what you’re doing strongly aligns with the funder’s priorities.”

Musial says that highlighting your sustainability plan is also paramount to building trust. Especially for a multiyear operating grant, Musial says, you want to present a long-term outlook.

Don’t say that you need an operating grant to survive, she warns. “Even if that’s the case, you can say, “This will help us keep the lights on and lay the groundwork to make sure we can keep the lights on for the next few years.”

We welcome your thoughts and questions about this article. Please [email the editors](#) or [submit a letter](#) for publication.