# Identifying Local, State and Federal Grants

February 2026

Primary Care Coalition Training

MyFedTrainer

primary care coalition

Asian American Center of Excellence
AACE
Asian American Health Initiative
Together To Build A Healthy Community

# About Your Presenter

**Rachel Werner** is the Principal of MyFedTrainer and owner and CEO of RBW Strategy, LLC. She conducts trainings through her own courses and speaks at local, regional, and national conferences on all grant related topics. She has over 23 years of experience with government grants.

Rachel and her team members have collectively garnered over **$450 million** for nonprofits and have managed **over $2.5 billion** in grant funding. She is an active member of the National Grant Management Association, Grant Professionals Association, and is a Certified Grants Professional (since 2014) and a Project Management Professional (since 2010).

# Learning Objectives

- Understand alignment between research and strategic planning
- Master key research criteria and tools (including some demonstrations)
- Navigate current funding landscapes
- Review potential challenges and develop solutions
- Q&A session

# Part 1: Strategic Prospect Research

# Polling Question

**How often do you research potential funding prospects?**

- Annually
- Semi-annually or quarterly
- As needed
- Who has the time?

# 2025 Funding Changes

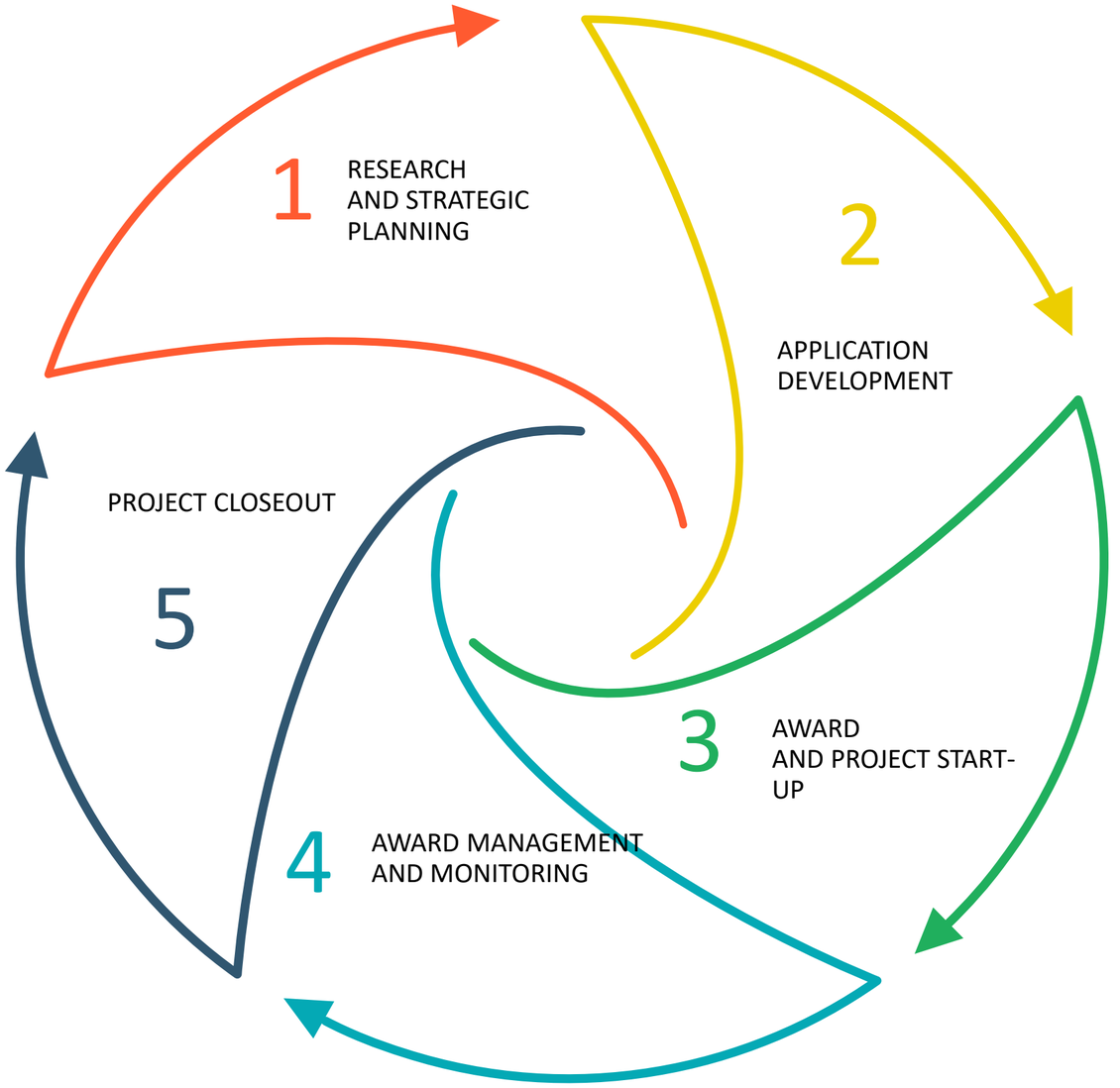
## Government

- Strict agency adherence to executive orders targeting specific populations and initiatives
- Congressional authorization of FY26 budget
- August 7th “Improving Oversight of Federal Grantmaking” Memo outlining changes to grantmaking process

## Philanthropy

- Increased competition for funding
- Changes in funder priorities, and important to cultivate relationships with funders
- Some alignment with Federal changes, and some not

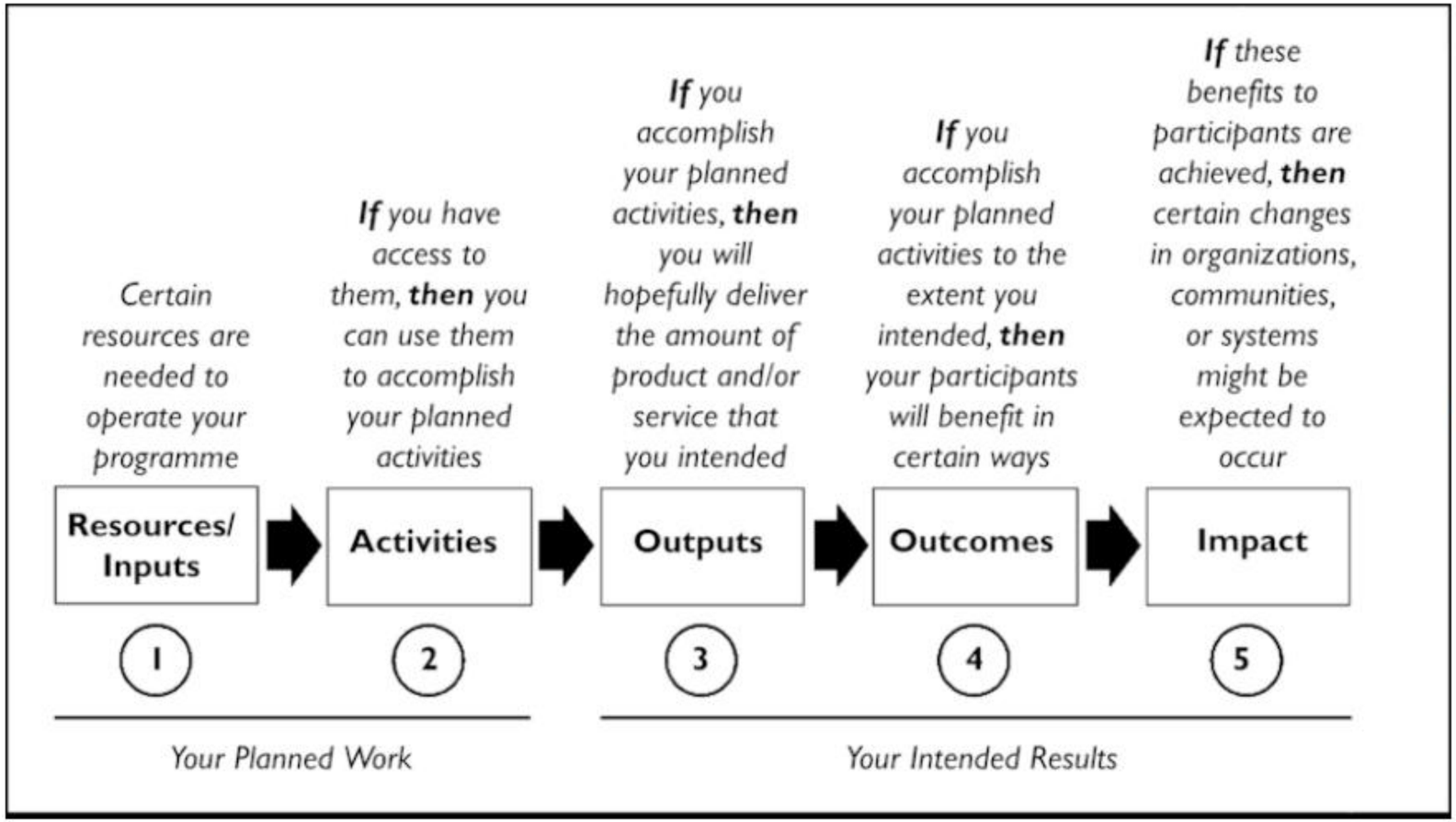
# Let's Review the Grant Lifecycle



# What does this mean for you?

Be prepared – the more you can plan ahead, the better it will be in responding when you meet these situations head on!

# Logic Model Overview




A Simple Logic Model (W. K. Kellogg Foundation, 2004)

# What don’t you know about Funders?

- Closed-door funder conversations during application review periods
- Funder’s giving priorities for that year/time period
- Funder’s prior relationships with other recipients
- Amount of funding already designated

# What don’t you know about Funders (but can find out)?

- Deadlines
- Contact information
- Prior giving and publicly available recipient information
- Funder attendance at panels and other speaking engagements

# Evaluation Criteria

| | Criteria Weight | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 0.12 | 0.12 | 0.15 | 0.09 | 0.06 | 0.08 | 0.05 | 0.05 | 0.14 | 0.14 | | |
| Funding Opportunity | Does this funder's mission align with my organization's goals? | Do the goals of this grant opportunity align with my project's intended outcome? | Does my organization meet this opportunity's eligibility requirements? | How open is this funder to new grantees? | Is my organization's geographic location represented historically? | How closely do past grantees align to my own organizations? | Is the median giving amount worth going after? | Do historical giving trends show positive growth? | Does my team have the bandwidth to take on this proposal? | Does my team have the bandwidth to tackle the reporting requirements? | Final Score | Grade |
| SAMPLE: AARP Communit | 8 | 10 | 10 | 6 | 1 | 3 | 10 | 10 | 10 | 10 | 8.3 | B |
| SAMPLE: USDA Sustainabl | 4 | 10 | 5 | 10 | 8 | 8 | 9 | 3 | 6 | 7 | 6.87 | D |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |
| | | | | | | | | | | | 0 | |

# Summary: Strategic Prospect Research

## Gather and analyze

- Gather and analyze available information on funders

## Obtain

- Obtain accurate and up to date information that aligns with organization’s goals and mission

## Increase

- Increase the organization’s chances of obtaining grants from those funders who are the best fit

## Develop

- Develop a cultivation strategy to increase the likelihood of success

# Polling Question

**What is your biggest concern about finding prospects?**

- Lack of fit with mission
- Too much competition
- Time to do the research and complete applications
- Tracking information

# Part 2: Mastering Prospect Research

# Funders by Type

**Government**

Set priorities, review panels and strict eligibility criteria

**National Foundation**

Innovative concept, collaborative proposal, high impact

**Local Foundation**

Regional and local focus, higher likelihood of cultivation

# Funders by Type

**Community Foundation**

Focused on supporting nonprofits as partners, community impact

**Family Foundation**

Treat as major donor with high cultivation

**Corporate Foundation**

Can be local, regional or national, also affiliated with corporate entity

# Application Differences

| Category | Government Grants | Private Foundations | Corporate Foundations | Family Foundations |
|---|---|---|---|---|
| **Primary Goal** | Advance public policy, deliver public services | Support mission-driven charitable impact | Align philanthropy with corporate values, brand, or workforce | Support causes aligned with family values or legacy |
| **Typical Award Size** | Often large ($50K → millions) | Small to large ($5K → millions, varies widely) | Usually small to mid-size ($5K → $250K) | Often small to mid-size ($1K → $100K+, varies) |
| **Competition Level** | Very high | Moderate to high | Moderate | Low to moderate (but relationship-driven) |
| **Application Format** | Highly structured (FOA, NOFO, portals, forms, attachments) | Varies: LOI + full proposal or simple online form | Usually short, focused application or online form | Often informal: letter, short proposal, or conversation first |
| **Narrative Style** | Technical, compliance-focused, data-heavy | Balanced: story + data + impact | Business-oriented, impact + visibility + outcomes | Personal, values-driven, relationship-oriented |
| **Timeline** | Long (months from application to award) | Medium (2–6 months common) | Short to medium | Flexible, sometimes fast |
| **Decision Drivers** | Eligibility, scoring criteria, evidence, capacity, compliance | Mission fit, outcomes, leadership, sustainability | Brand alignment, community impact, PR/CSR goals | Personal interest, trust, relationships, local impact |

# Funder Information to Track

- General information on funder
- Giving cycles and deadlines
- Giving priorities and award amounts
- Relevant past grantees and projects (review 990 form)
- Trustees and staff to see if connection to nonprofit board members and/or staff
- Eligibility and admin requirements
- Geographic area(s) of focus

# Finding Good Data

When selecting a database to use and/or subscribe to, keep in mind that what distinguishes a great grants database from a mediocre one is not all the bells and whistles and data visualizations. What matters is GOOD DATA.

You'll want to ask questions like:

- How many foundations are in the database?
- Is the information accurate and recent?
- How much information on each funder is cross-searchable?
- How are grantmakers' programmatic priorities determined and made searchable?
- Can you search by grants made to other organizations?



Source: https://fundingforgood.org/free-grant-research-tools/

# Research Databases

- Chat GPT – free to use and with good prompt engineering, can lead to some strong sources to review
- Foundation Directory* - Free at several public libraries, but need to be specific with the research criteria
- Grants.gov – Federal grants only. They are simplifying their database to make it easier to use
- Instrumentl* - Two-week free trial. Best tool on the market, but is expensive so take advantage of the free trial



***Denotes a fee-based system, but there might be a free option included.**

# Research Databases

- Grant Station* - Does not offer a free version, but you can sign up for their newsletter, GrantStation Insider, which emails free grant notices
- Grant Gopher* - Offers a free version and sends out grant announcements
- Grantmakers.io - Not as extensive as others, but it's free
- Impala* - Free version is pretty robust but may be a little difficult to navigate. Functionality includes ability to look at other nonprofit organizations and see who is funding them
- The Grantsmanship Center - Free list of State Grant Resources on their website



***Denotes a fee-based system, but there might be a free option included.**

# Other (Local) Free Research Tools

- Member Associations – Aligned with your sector or mission
- Greater Washington Community Foundation – Local and regional opportunities, plus donor advised funds
- Maryland Nonprofits – Trainings and Maryland-based opportunities
- Nonprofit Montgomery – Local opportunities and trainings
- State of Maryland Governors' Grants Office – Nonprofit Navigator and state agency opportunities
- eMMA (contracts and procurements only) – Maryland grants and contract opportunities



***Sign up for emails/newsletters where you can get updates on new funding opportunities.**

# Research Tools to Demonstrate Today

- Grant Gopher (https://grantgopher.com/)
- Grants.gov (https://grants.gov)
- Grantmakers.io (https://www.grantmakers.io/)
- eMMA (https://emma.maryland.gov/)
- Impala (https://app.impala.digital/app/search)
- Maryland Governor's Grants Office – Nonprofit Navigator program (https://grants.maryland.gov/Pages/Grants-Office.aspx)
- The Grantsmanship Center (https://www.tgci.com/funding-sources/Maryland)
- ChatGPT (https://chatgpt.com)

# Scenario 1: Mental Health Support

A small AAPI community nonprofit in Montgomery County serving Korean and Vietnamese families wants to launch a culturally responsive youth mental health support program (workshops, peer groups, family education).

# Scenario 2: Housing Support Services

A small AAPI nonprofit serving recent immigrants and refugees in the DMV area wants funding for housing stability services: case management, eviction prevention, and housing navigation.

# Scenario 3: After-School Education

A small Chinese-American community nonprofit in Montgomery County wants to expand an after-school tutoring and college readiness program for middle and high school students.

# ChatGPT Tips

- Be very specific with the prompt engineering to receive the best fit funders
- Sample prompt: *"Can you please provide a list of 10 potential corporate and private foundation funding prospects for a nonprofit focused on the AAPI community in Montgomery County, Maryland, that provides mental health counseling services to the K-12 population?"*
- Sample prompt: *"Can you please provide a list of 10 corporate entities that support nonprofits in the DMV area who provide services to aging adults in need?"*

# Pros and Cons of Different Databases

## Foundation Directory

- **PROS**
- Huge repository of information
- Links to websites and 990 forms
- Free use at selected libraries
- Instructions: https://youtu.be/v5q8IMo1qUY
- **CONS:**
- Information is not always updated
- Cannot access at home without a paid subscription
- Large list of funders that can be hard to review
- Only private and corporate funding sources

## Instrumentl

- **PROS:**
- The algorithm focuses on best-fit funders, and there is AI searching available
- A great deal of useful information on funders, which can be saved and used for post-award
- Government and non-government funding sources
- Free 2-week trial using this code: www.instrumentl.com/rbw
- **CONS:**
- More expensive product

## Grants.Gov

- **PROS:**
- Primary database for federal grant opportunities
- Becoming easier to navigate
- Easier login and access with all information in one place
- Find opportunities by agency
- Technical support available
- **CONS:**
- Can be difficult to navigate and upload materials
- System is not the most intuitive to use

## ChatGPT

- **PROS:**
- Easy to receive results
- Can continue requesting information on specific funders
- Can request to look at specific data sources
- **CONS:**
- May not always be accurate – important to check against a search engine or on the funder's website
- Important to understand prompt engineering to find the best results, so it takes some understanding of using Generative AI systems

# Polling Question

**Which type of research tool do you want to start using now?**

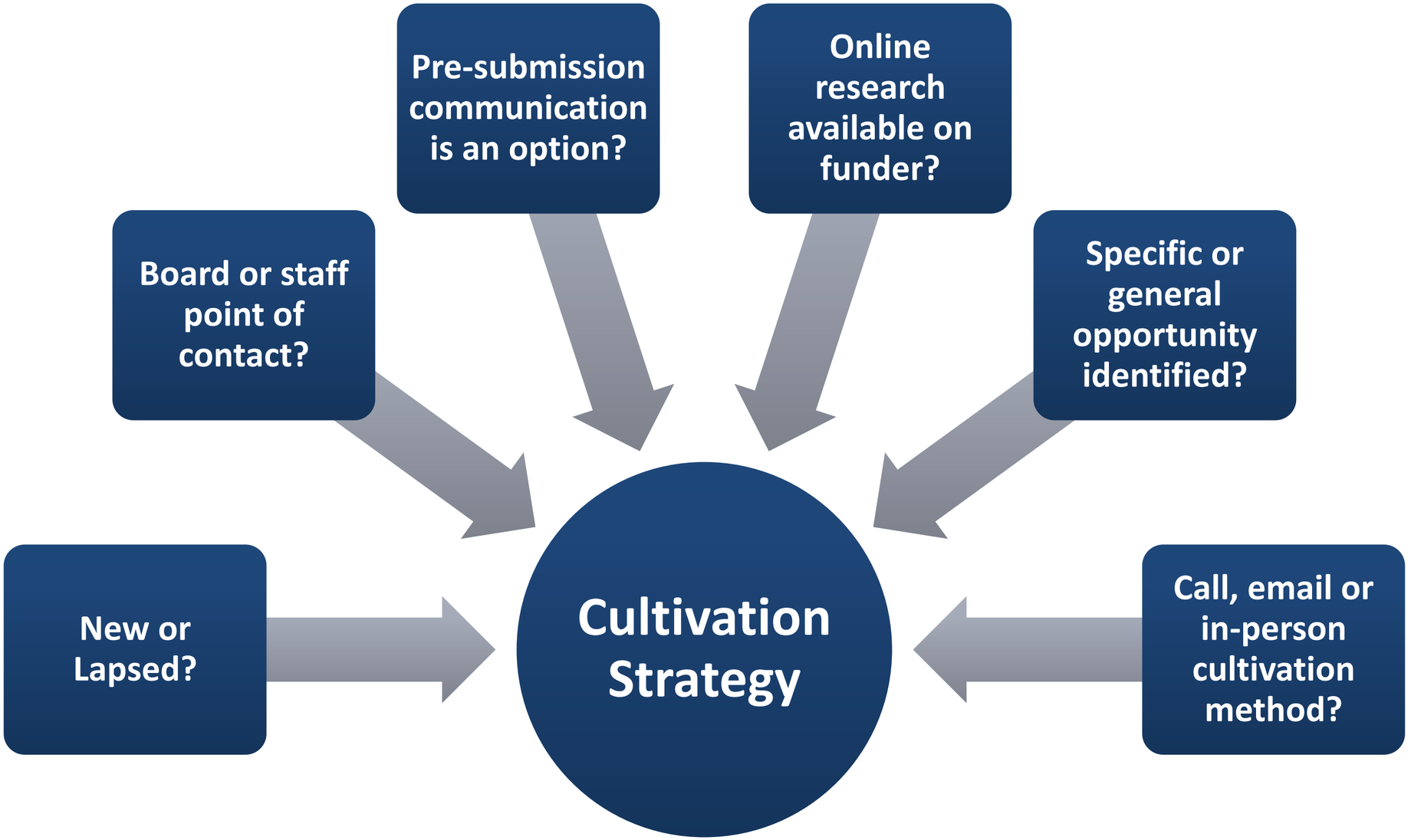
- Generative AI (ChatGPT)
- Free database
- Paid database
- Grants.Gov
- Maryland Governor’s Grants Office
- Other

# Research Takeaways

1. Determine the questions you want answered about funders and the funding opportunities.
2. Use a search engine (fee-based or free) to gather the initial prospects.
3. Review and assess prospects using one of the free databases, ChatGPT, Google, or funder websites.
4. Sign up for newsletters to access updates on local and regional opportunities.
5. Maintain and update your list of prospects using a database, Google sheet, or Excel spreadsheet.

# Part 3: Funder Cultivation

# Funder Cultivation Brainstorming



# Funder Relationship Status

| New Funders | Lapsed Funders | Renewal Funders |
|---|---|---|
| ▪ Competing against renewal funders and those favorable to foundation<br>▪ Increase in applications each year<br>▪ May require multiple requests for funding before submission is awarded<br>▪ Information on the website or funding database is not always accurate | ▪ Once organization does not receive funding relationship has to restart<br>▪ Outreach to previous contact to reconnect<br>▪ Interest in organization based on prior funding, and need to determine why there was a lapse (organization or funder) | ▪ Established relationship based on mutually beneficial partnership<br>▪ Can serve as organizational ambassadors to garner new interest<br>▪ Cultivation maintains relationship to sustain interests<br>▪ Applications are less important as providing information that funder wants |

# Email Cultivation Strategies

**1. Subject Line (Critical!) Make it specific and compelling, not generic.**

Weak examples:

"Funding opportunity“

"Partnership inquiry“

"Follow up“

Strong examples:

"Referred by Ms. A —youth mental health program“

"Fellow UMBC alum working on housing crisis“

"Your interest in food security + our new initiative“

"Quick question about your education funding priorities“

# Email Cultivation Strategies

**2. Opening Hook (First sentence) Establish the connection or relevance immediately. Options:**

Mutual connection: “Ms. A suggested I reach out to you...“

Shared affiliation: "As a fellow volunteer with Meals on Wheels...“

Their known interest: "I know you're passionate about early childhood education...“

Recent news/event: "Congratulations on your company's expansion to our region...“

Geographic tie: "As a longtime supporter of Riverside organizations..."

# Email Cultivation Strategies

**3. Who You Are (1-2 sentences) Brief organizational introduction that establishes credibility. Example:**

"I'm the Executive Director of XYZ Family Services, which has provided emergency assistance and case management to local families in crisis for 18 years. Last year we helped 800 families avoid eviction and supported 45 at-risk teens through our mentoring program.“

**4. Why You're Reaching Out (1-2 sentences) The specific funding need or opportunity—be concrete. Example:**

"We're launching a capital campaign to renovate our facility and create spaces where families can receive services with dignity and privacy. We're seeking lead investors who care about strengthening our community's safety net."

# Email Cultivation Strategies

**5. Why THEM Specifically (1 sentence) This is what separates good outreach from spam. Examples:**

"Given your family's longtime support of children's services in our county...“

"Your foundation's focus on sustainable, evidence-based programs aligns perfectly with our approach...“

**"**I noticed your recent gift to the Community Foundation's homelessness initiative...“

**6. The Specific Ask (1-2 sentences) Be clear about what you want—usually a meeting, not money (yet). Examples:**

"Would you be open to a 20-minute coffee to learn more about our work?“

"I'd love to send you our two-page case statement and then schedule a brief call if you're interested.“

"Could we set up a site visit so you can see our programs in action?"

# Email Cultivation Strategies

**7. Easy Close Make it simple to respond and show respect for their time.**

**Example:**

"I know you receive many requests. I'm happy to work around your schedule, or if this isn't a fit, I completely understand. Either way, I'd value the chance to connect briefly."

# Exercise 3: Funder Outreach

**Scenario:** Your Board President shared that they spoke with a program officer at a local foundation and said you would follow up via email to share more about your work.

**Question:** How should you craft your message to this funder? What information would you want to include?

# Polling Question

**What is your greatest challenge related to funder outreach?**

- Unsure how to approach funders
- Resource capacity
- Tracking and follow-up
- Other

# Part 4:
# Wrap-up and Q&A

# Common Research Challenges

- Time management
- Ongoing information tracking
- Cultivating relationships
- Application denials

# Challenge #1: Time Management

- Batch your research time: Set aside dedicated blocks (even just 2-3 hours weekly) specifically for prospect research rather than trying to squeeze it in sporadically, and delegate others to help if possible
- Focus on quality over quantity: Research 5-10 highly aligned prospects thoroughly rather than 50 superficially
- Leverage free tools strategically: Use GuideStar's free tier, foundation websites, and IRS Form 990s available through ProPublica's Nonprofit Explorer

# Challenge #2: Ongoing Information Tracking

- Use free/low-cost tools: Google Sheets or Airtable can serve as effective grant tracking systems with fields for deadline, amount requested, status, contact info, and notes
- Create a simple tracking calendar: Use a shared Google Calendar color-coded by deadline proximity (red for upcoming, yellow for next quarter, etc.)
- Establish a filing system: Keep folders (digital or physical) for each funder with guidelines, past correspondence, and submitted proposals

# Challenge #2: Ongoing Information Tracking

- Document everything immediately: After every funder interaction, spend 5 minutes documenting key takeaways, next steps, and relationship notes
- Set up automated reminders: Use calendar alerts for application deadlines, reporting requirements, and relationship touches
- Conduct quarterly reviews: Every 3 months, review your tracking system to update information, remove dead leads, and identify gaps

# Challenge #3: Cultivating Relationships

- Start with program officers: Call or email foundation staff with thoughtful questions before applying; most appreciate organizations that do their homework
- Attend funder-hosted events: Many foundations offer free webinars, site visits, or community meetings. Prioritize attendance even if virtual
- Leverage existing connections: Ask board members, current funders, or partner organizations for introductions to program officers

# Challenge #3: Cultivating Relationships

- Provide valuable updates: Even without a grant, share brief impact stories or invite funders to events to keep your organization on their radar
- Be responsive and professional: Reply promptly to all communications and submit high-quality applications on time. Reliability builds relationships
- Think long-term: Treat rejected applications as relationship beginnings, not endings, and thank them and ask for their feedback

# Challenge #4: Application Denials

- Always request feedback: Politely ask program officers what would strengthen a future application or if there were specific gaps
- Analyze patterns: Keep a simple log of denials noting stated reasons—if multiple funders cite the same issue (weak evaluation plan, unclear budget), prioritize fixing it
- Maintain the relationship: Send a gracious thank-you note after rejection and ask about reapplying or other funding opportunities

# Challenge #4: Application Denials

- Don't take it personally: Remember that denials often reflect limited funds, shifting priorities, or other factors rather than your organization's worth
- Build a robust pipeline: Have 3-4x more prospects in research than you need so individual denials don't derail fundraising goals
- Debrief and improve: After each denial, spend time reviewing the application to identify what could be strengthened for the next opportunity
- Know when to move on: If a funder consistently doesn't align with your work or has rejected you multiple times, redirect energy to better-fit prospects

# Key Takeaways

- Take time to establish key priority areas for funding, and specific funding gaps
- Identify the criteria for best fit funders, and also the system/tool to track and manage this information
- Leverage different search vehicles to maximize the best results
- Continue this process several times, as funder opportunities can change

# Questions

# Evaluation Form

https://forms.office.com/pages/responsepage.aspx?id=-bEBbuWxc0Csl3eAaaCtZI42IWQdtktAqk4p4hEVcN1UMDhPUkhZSjE5Vjg2OUJDN0NFOUFGMUFLVSQlQCN0PWcu&route=shorturl

# Thank You!

MyFedTrainer Team

Questions? support@myfedtrainer.com

Use this QR code to join our newsletter to receive weekly grant compliance tips

MyFedTrainer