



FUNDAMENTALS

— SOLUTIONS FOR YOUR CAUSE

Unlocking Funding From Foundations, Government, and Corporations
Strategic relationship building for a changing economic landscape



2026

Peter Hoppe, CFRE



Peter Hoppe is a Certified Fund Raising Executive (CFRE) with over 30 years of experience in the charitable sector. Before establishing his fundraising agency in 1995, Peter worked in senior leadership positions for several major organizations, including the Kidney Foundation of Canada, Cystic Fibrosis Canada and Canadian Feed The Children (Kinvia).

Peter is also a part-time professor at Seneca Polytechnic, where he teaches graduate-level courses on philanthropic trends, fund development strategies and social enterprises. He also taught the same subjects at Humber Polytechnic.

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Institutional Giving

- Private, Public and Community Foundations
- Corporations
- Government Programs



i. 2021 T3010 Snapshot Data ²

	Private foundations	Public foundations	Totals
Number of foundations ³	6,225	4,836	11,061
Gifts to qualified donees (CAD) ⁴	\$5,450,390,633	\$4,474,747,132	\$9,925,137,765
Assets (CAD) ⁵	\$87,140,918,068	\$48,141,641,036	\$135,282,559,104
Location	Most private and public foundations are found in Ontario, Quebec, British Columbia and Alberta		

pfc.ca



Philanthropic
Foundations
Canada

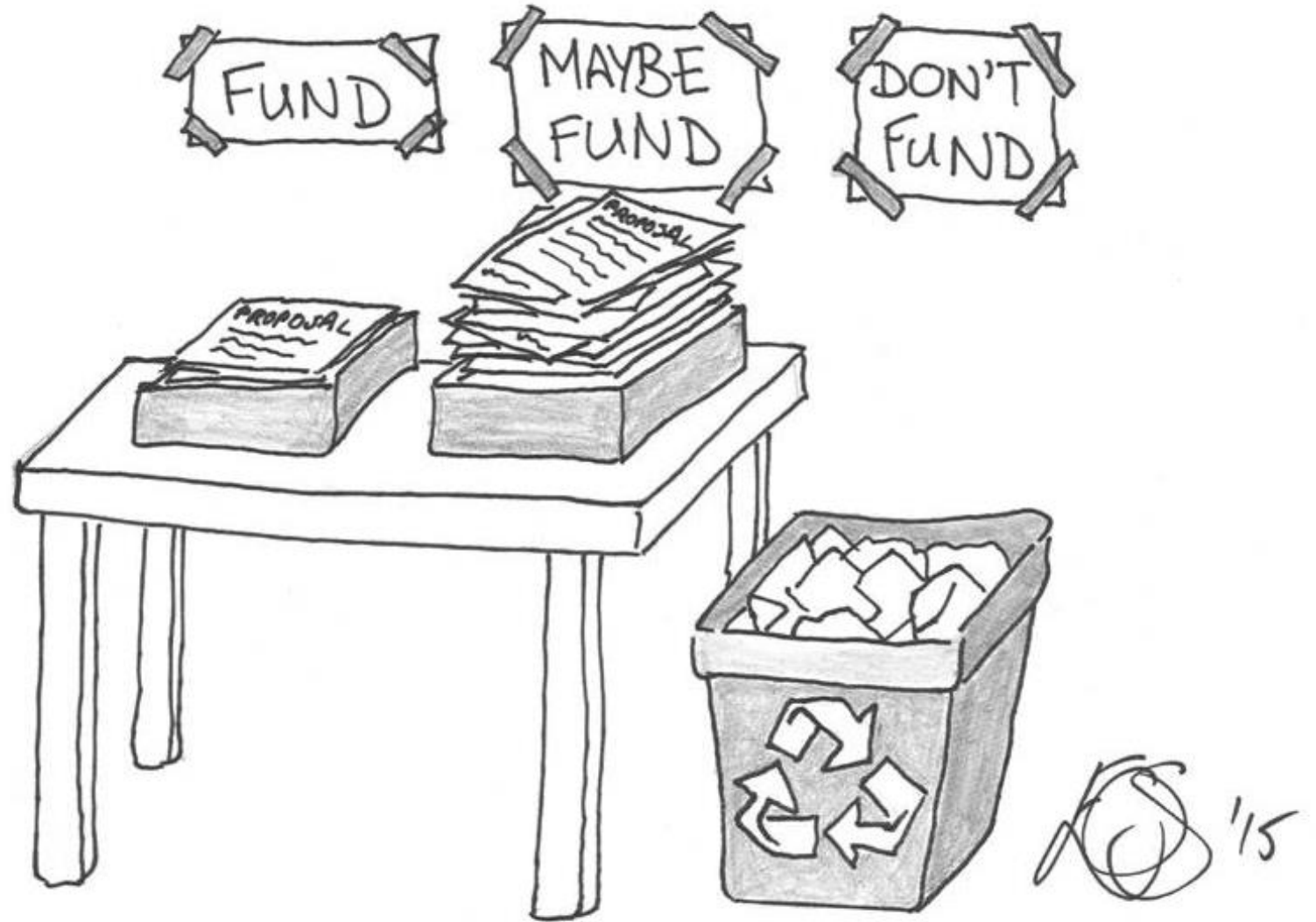
Fondations
Philanthropiques
Canada

The Reality...



“Is it just me or are these review panels getting a lot tougher?”

The Reality...



Review panel categories.

An Uncertain Economy

- The future of the economy is unpredictable
- Fluctuating prices
- Job insecurity
- Market volatility
- Policy or political instability



Impact on Institutional Giving

- Corporate sponsors may pause or shrink their community programs.
- Foundations may reduce grants if their investment returns drop.
- Governments may shift program priorities or cut back funding.



And while all of this uncertainty is happening..

- Organizational revenue is highly unpredictable
- Demand for charity services is increasing
- Rising charitable operational costs



Overcoming Challenges

1. Prioritize your funding and program needs

- ✓ Agree on programs that are advancing your mission
- ✓ Prepare to make cuts to lower-priority programs
- ✓ Focus funding requests on high-priority programs



Overcoming Challenges

2. Intensify your prospect research

- ✓ Grant Connect
- ✓ Funder website
- ✓ Grant recipient website
- ✓ Match your needs with funder interests
- ✓ Take the median grant amount into account
- ✓ Identify grants to organizations similar to your own
- ✓ Create prospect profiles



Overcoming Challenges

3. Prepare a Case for Support for priority programs

- ✓ The urgent evidence-based need - the problem
- ✓ Your ability to address the need - the solution
- ✓ Your plan to deliver the solution - theory of change
- ✓ The cost of your solution & plan
- ✓ Goals, objectives, outcomes & impact
- ✓ Organizational background



Overcoming Challenges

4. Create a template proposal

- ✓ informs online applications
- ✓ Keep as brief as possible – 3 to 4 pages
- ✓ Focus on impact rather than organizational needs
- ✓ Align the need with your solution



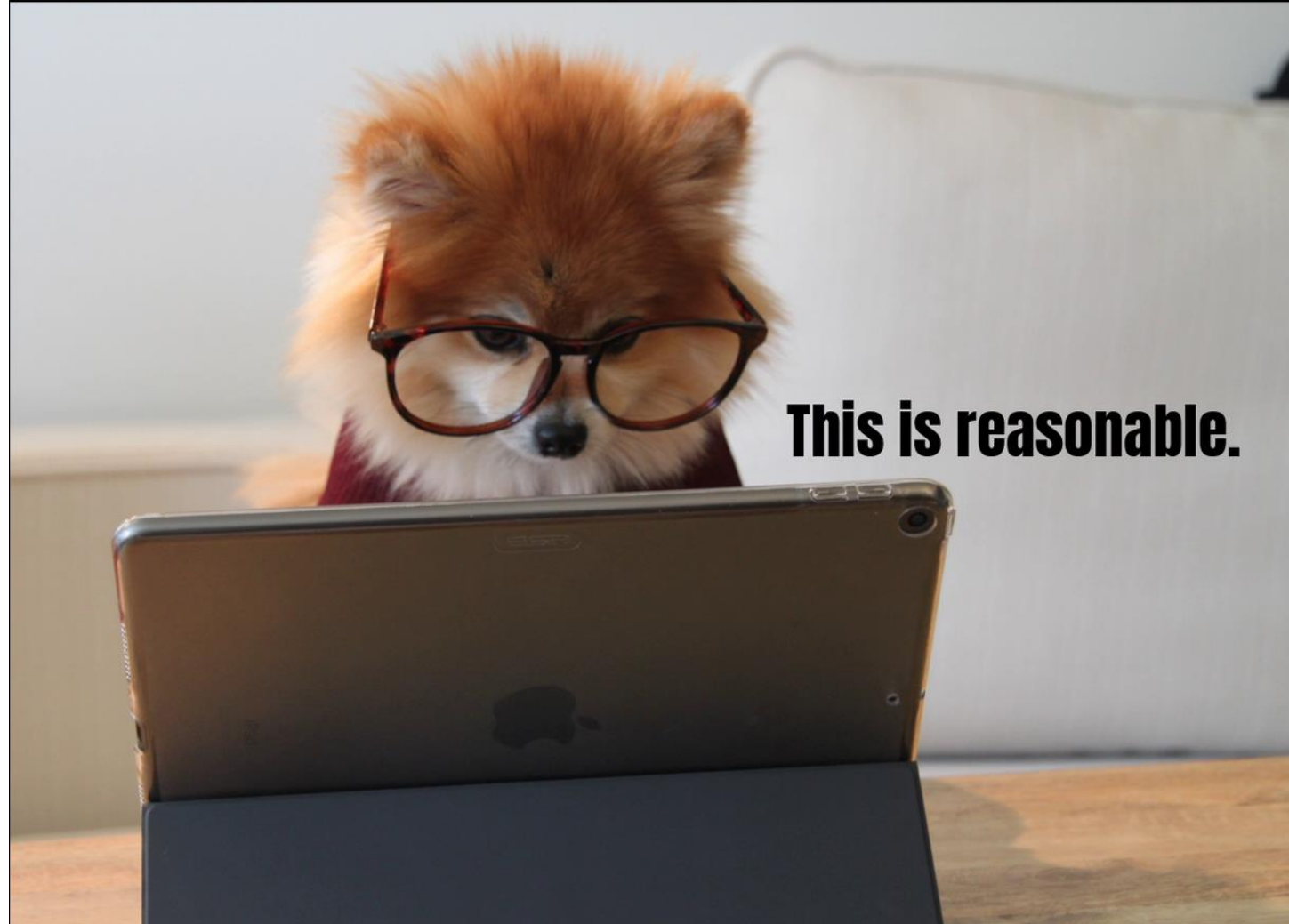
Overcoming Challenges

5. Get ready for online applications

- ✓ Every year, more foundations are switching to online applications instead of accepting traditional grant proposals (30%-40%)
- ✓ However, online applications usually require the same information included in a traditional grant proposal.
- ✓ Preparing a traditional grant proposal template serves as a template for online applications.



When a funder asks to give your mission, history, and outcomes in 100 words or less



This is reasonable.

Overcoming Challenges

6. Deliver a Letter of Inquiry

- ✓ Your introduction and first impression
- ✓ It saves time and narrows down your search
- ✓ A great way to launch your relationship
- ✓ Compare your mission to funder interests
- ✓ Ask for permission to submit a proposal



Overcoming Challenges

7. Prepare a proposal customized to funder interests

- ✓ Deliver proposals 6 - 12 months in advance of need
- ✓ Keep proposals as brief as possible – 3 to 4 pages
- ✓ Focus on impact rather than organizational needs
- ✓ Respect deadlines and information requirements



Overcoming Challenges

8. Don't forget to follow up – but not too often
- ✓ Include project and funding updates – 8 weeks
 - ✓ Keep prospects informed
 - ✓ Demonstrate organizational sustainability
 - ✓ Build relationships with decision makers



Overcoming Challenges

9. Stewardship is critical

- ✓ Provide annual compelling stewardship reports
- ✓ Share with organizational leaders and stakeholders
- ✓ Focus on outcomes and impact
- ✓ Send to funders who have granted and declined



Overcoming Challenges

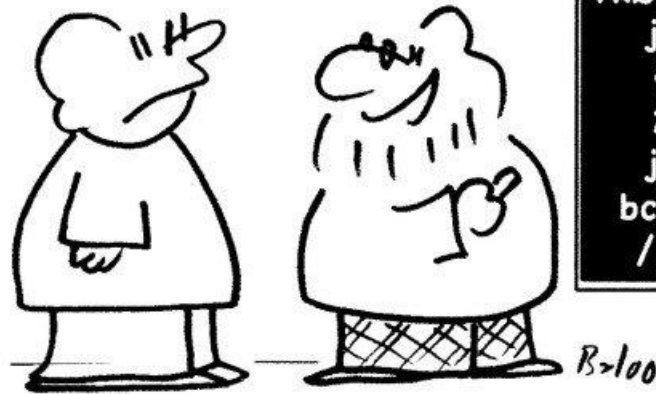
10. Remember that you are building a relationship

- ✓ It's not about making the sale
- ✓ Relationship building takes time
- ✓ You won't hear back from most foundations
- ✓ Don't get discouraged with declines
- ✓ If the funder is a good match -persevere



Institutional giving is more competitive than ever!

Plan	Plan your 2027 institutional giving strategy now
Prioritize	Prioritize your programs and funding needs
Research	Deepen prospect research
Focus	Focus on relationship building
Inform	Keep your funders and prospects informed



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“It’s a foolproof formula for
 writing grant applications.”



Thank you!

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