

Identifying and Approaching U.S. Institutional Funders

A resource for foreign charitable organizations

Why Paragon prepared this resource

Organizations Paragon works with ask us regularly how to raise money from U.S. institutional funders. While we unfortunately cannot provide referrals to donors, our position between U.S. funders and the foreign organizations they support provides us with a unique vantage point.

U.S. institutional money is available to organizations outside the United States, and a large amount of it already reaches organizations like yours. What follows describes how that funding works in practice, so you get the most from the time you dedicate.

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1 **Begin with the funders you already have**

Most organizations reading this have received money from a U.S. institutional source at least once. Those existing relationships are usually more useful to you than any new name research might produce, yet they are frequently underutilized.

If your grant came from a U.S. private foundation, you have an existing relationship with an institution and, in most cases, a named program officer. That provides an opportunity for several conversations: renewal, a transition from restricted project support to general operating support, a multi-year commitment, or an introduction to another funder. The last of these matters most, for reasons covered in section 2.

If your grant came through a donor-advised fund (DAF) sponsoring organization, the situation is less anonymous than most grantees assume. A donor-advised fund is not a foundation with a grants program. It is an account held at a sponsoring organization, and the grants are recommended by an individual, a family, or a company.

DAF sponsoring organizations let the advising donor decide, grant by grant, how much information to pass on: the name and mailing address of the donor, the name of the fund only, or nothing at all. Most donors choose to be identified. A 2024 study by the Donor Advised Fund Research Collaborative, covering 2.3 million grants across 111 sponsoring organizations, found that fewer than 4 percent were anonymous. Its companion survey of sponsors found that six in ten release the donor's name by default, and roughly a third release a mailing address with it. DAF sponsoring organizations send that information along so grantees can thank the donor.

If a DAF has given to you, the letter that came with the grant may name the person who recommended it. These letters tend to be read as acknowledgments and filed accordingly, so the name is easy to pass over. It is worth returning to the file.

Where the donor chose anonymity, the sponsor releases nothing and no public filing ties the grant to its source. Even then, the grant itself works for you: a U.S. donor examined your organization and chose to fund it, and that fact belongs in every funding conversation that follows.

If your grant came from a funder outside the United States, the relationship still helps you here. Funding networks cross borders: non-U.S. foundations, government donors, and international NGOs often co-fund with U.S. foundations, sit in the same donor collaboratives, and meet at the same convenings. A program officer at any of them can tell you which U.S. funders work in your field, and an introduction from a funder who already supports you carries the same weight wherever that funder is based.

2 An introduction opens doors a proposal cannot

At most U.S. grantmaking foundations, an introduction from someone the funder already trusts does much more than a proposal written cold, and that determines where research time pays off. The introductions that carry the most weight come from a funder who already supports you. A recommendation from one program officer to another takes little time to make, but it is not given lightly: the sender is putting their judgment and their name behind your work, and that is precisely what matters to the counterpart.

Many U.S. grantmakers say plainly on their own websites that they find new grantees through trusted networks, not through proposals that arrive cold. In their own words:

FORD FOUNDATION

A private foundation

"We do not accept unsolicited grant proposals by mail, email or phone." Its published account of its grantmaking adds that in a typical year, **less than one percent of unsolicited applications receive a grant.**

SEGAL FAMILY FOUNDATION

A private foundation and substantial funder in Africa

"We do not have an open application and we do not accept unsolicited proposals because we have a trusted network of referrals across Africa."

GLOBAL GREENGRANTS FUND

A public charity that regrants to grassroots organizations worldwide

"We do not accept unsolicited grant proposals. Our grantmaking model relies on trusted experts worldwide to identify organizations working in their regions or issue areas."

GLOBAL FUND FOR WOMEN

A regrantee public charity

"We don't accept unsolicited funding applications."

This pattern holds well beyond those examples. Every U.S. private foundation states on its annual return whether it makes grants only at its own initiative. Of the 112,733 that filed for fiscal 2023, 71 percent said they do. Seven in ten have told the federal government they do not accept unsolicited applications. The other three in ten did not make that declaration, a group that includes foundations that publish instructions for applying as well as foundations that simply left the item incomplete. The door is open more often at the largest foundations: of the 1,744 with assets above \$100 million, 38 percent accept unsolicited requests, against 29 percent overall.

Two things follow.

The first is that your research time should go to the funders that already support organizations like yours, which is what section 3 is for. Which peers a foundation funds is the strongest evidence of whether your work fits and whether the funder is reachable at all.

The other is that most applications end at the first stage. Screening happens well before anyone reads a full proposal or opens a due diligence file.

What an introduction changes is how your materials are received: an application from a name the program officer has already heard rises to the top.

When a foundation accepts unsolicited applications

An introduction is not always available, and not every approach needs one. Foundation policies run from fully closed to genuinely open, and it is the middle ground that grantees most often mistake for a closed door. The **MacArthur Foundation** is an example. Its guidance for grantseekers states: "We generally do not fund unsolicited proposals. Although very few are selected for funding, we review unsolicited proposals that meet our guidelines," and the same page lists which of its programs are currently accepting letters of inquiry.

The first step is smaller than most grantees expect. A foundation that accepts applications rarely wants a full proposal first: most ask for a letter of inquiry, one to three pages, read by a program officer to test fit before either side spends time on anything longer.

Foundations that work this way publish what they want: geography, sector, organization size, and often a minimum or maximum grant. Read those guidelines closely and write only to the funders for which there is a close fit.

Applications now generally go through a portal such as Submittable, Fluxx, or Foundant rather than by email or post, and many foundations open for submissions only during set windows. The guidelines will say when as well as how. Whichever route brings you to a foundation's attention, it will eventually want the documents listed in section 4, so have them ready before you apply.

Intermediaries are a class of their own

Two of the funders quoted above, Global Fund for Women and Global Greengrants Fund, are not private foundations. They are pooled funds: U.S. public charities that pool money from foundations, DAFs, and individuals and regrant it to organizations around the world. Regional funds work the same way for a single part of the world. Both kinds are intermediaries, and both deserve a place on your list.

For a foreign organization, an intermediary is one path of entry into U.S. institutional money. Moving funds to organizations like yours is the intermediary's entire purpose, grants tend to be smaller and procedures lighter than at a large private foundation, and a grant from one is a U.S. institutional grant you can cite to every funder that follows. Most do not accept unsolicited proposals either, but the way in is different, and it is usually published. Global Greengrants finds grantees through a network of regional advisors who identify organizations in their own countries. Global Fund for Women finds new partners through trusted relationships with grassroots leaders, advisors, and movement networks, so the route in is to become visible to the movements it funds.

3 Finding the funders that already give in your country and sector

Your research has three questions to answer. Which funders already support work like yours? Which of your peers do they already fund? And which of them accept unsolicited applications? The first two questions build your list. The third tells you how to approach each funder on it: an introduction helps with every funder, and where a funder accepts applications, you can apply as well.

These three questions apply to every kind of U.S. grantmaker. Private foundations are the only funders whose public filings are required to name their foreign grantees. Every one files an annual return with the U.S. tax authorities, **Form 990-PF**, and one schedule inside it lists every grant the foundation paid during the year. That schedule is the most useful public record of who funds what, whether you read it directly or through a database built from it. The field is roughly 113,000 foundations, and the first job is narrowing it to a shortlist.

Narrowing the field

Start with your peers. Foreign organizations doing similar work in your country or region publish their funders in annual reports, on websites, and on acknowledgement pages. Reading those lists costs nothing, and every funder you find there already gives to work like yours.

Then widen the list. A search database is the fastest way to do this. You filter by country, sector, and grant size, and identify foundations that have actually funded work like yours. If you are conducting a comprehensive search, a subscription costs less than the staff hours it replaces, and an organization that intends to pursue U.S. institutional funding as a matter of course should budget for one.

Candid

Candid is the most comprehensive and the one most grant professionals reach for first. A subscription is the direct route, sold by month or by year, and if you budget for one database, this is the default choice. Candid also offers free on-site access at more than 2,000 partner libraries and resource centers in the United States.

GrantStation

GrantStation is the lower-cost subscription. Most of its content serves U.S. grantseekers, but it maintains a separate, curated database of international funding opportunities, searchable by country and region, and a monthly international newsletter.

Devex

Devex sells memberships covering funding across global development, including donor agencies and foundations. It discounts membership for students and for individuals at small organizations headquartered in low and middle income countries. Eligibility is assessed on request rather than applied automatically.

The free route

ProPublica Nonprofit Explorer (projects.propublica.org/nonprofits) searches the full text of nonprofits' annual tax returns at no cost, and that includes every kind of grantmaker: private foundations, grantmaking public charities, and intermediaries. The search covers only returns filed electronically, so coverage is essentially complete from tax year 2020 onward and partial before that. It can filter by state, category, and organization size, but not by grant size or grant program, so it is slower and less precise than a paid database. It will, however, find funders that have named your country in a return. It is the best free substitute for a subscription, and it does not restrict access by country.

Reading the Form 990-PF

Everything in this section refers to the Form 990-PF, which only U.S. private foundations file. Community foundations, donor-advised fund sponsors, and regranting intermediaries file a Form 990 instead, and report their foreign grants on Schedule F by region rather than by country. The form's instructions direct those filers not to name their foreign grantees, so you cannot build a grantee list for those funders from their returns.

A grantmaker's Form 990-PF can help you decide whether the funder is worth an approach. It lists every grant the foundation paid during the year, with the recipient, the amount and the purpose, and then separately the grants it has approved for future payment. Above those lists it states whether the foundation accepts applications at all. Read together, that tells you whether a foundation has funded work like yours, in your country, at a size near what you need, and more than once.

For private foundation research, a database subscription does not replace the Form 990-PF return itself. What a database shows about a private foundation's grants comes almost entirely from these returns. Reading the return lets you confirm a figure before you rely on it, read the foundation's own wording for what each grant was for, and fill the gaps on foundations whose profiles are thin, usually the smaller ones. For a foundation with no website, the return is also the only public statement of what it funds and whether it will consider an application.

Where the grants appear

Under the heading "Grants and Contributions Paid During the Year or Approved for Future Payment."

Look below the grants already paid

The schedule lists what the foundation paid during the year, then lists separately which grantees hold multi-year commitments, which is a signal of a sustained relationship.

Whether the foundation accepts applications

Immediately above the list of grants paid, in the same part of the Form 990-PF, the foundation either checks a box stating that it funds only organizations it has selected itself, or it gives the name and contact details of the person applications should be sent to, what those applications should contain, any deadline, and any limits on geography, field, or type of organization.

Where to get a return

ProPublica holds them, and so does IRS Tax Exempt Organization Search (apps.irs.gov/app/eos), where you can retrieve a return by the foundation's name or tax identification number.

How current the information is

Foundations file once a year, and the returns are then processed and published. At a large foundation, a grant usually becomes visible somewhere between eighteen months and three years after it was paid. Small foundations that file without an extension can show up within a year. That is an observed pattern, not a published standard. Either way, you are looking at what a foundation did, not what it is doing.

A practical plan for building the shortlist

Below is a plan you can follow, step by step. It finds the funders that already support work like yours and shows you how to approach each one.

BUILDING THE SHORTLIST

- 1 Write down your focus.** Your country, and one or two short phrases describing your work. For example, "Uganda, girls' secondary education," or "Philippines, coastal fisheries."
- 2 List three to ten comparable organizations.** Foreign organizations doing similar work in your country or region.
- 3 Read their donor lists.** Their websites, annual reports, and acknowledgement pages name the U.S. funders that support them. Write those names down, and note which peer names each one.
- 4 Widen the list.** Filter a search database by your country and sector, or run the same terms through ProPublica's full-text search.
- 5 Cut it back before you open anything.** Read each funder's published guidelines and drop the ones that rule you out on geography, sector, or grant size. Mark each of the rest closed, open, or open to an inquiry only. A small private foundation may have no website, in which case its return will answer this. Do not drop a funder because it is closed to unsolicited applications. Seven in ten private foundations are, and the ones that match your work will be no exception. This step is what keeps the next one from consuming weeks.
- 6 Check the grants record.** For each private foundation still on your list, look at its last three years of grants, in your database if you subscribe. If you choose to read the Form 990-PF itself, which only private foundations file, search it for 'Grants and Contributions Paid,' then read the address lines for your country and the purpose column for language describing work like yours. For community foundations, DAF sponsors, and intermediaries, annual reports take the place of this step.
- 7 Note which grants repeat, and at what size.** A grantee turning up across several years points to a sustained interest rather than a single decision. The amounts matter as much: a foundation whose grants run in the hundreds of thousands rarely makes small ones, and a foundation that gives in small amounts will not fund a large budget.
- 8 Build one table** with these columns: funder, country funded, the peer organization it supports, sector, amount, the exact wording of the purpose, whether the grant repeats, and whether the funder is closed, open, or open to an inquiry only.

For every funder on it, the finished table tells you which ones accept applications, what size of request fits, and how each funder describes the work it funds, in language you can borrow when you approach them.

4 Before a funder asks

Foundations run due diligence before releasing money, and organizations that have not assembled their paperwork lose weeks at this stage. Having the following ready in advance, in English, moves you through due diligence faster and gets the money released sooner:

- ☐ Registration and governing documents
- ☐ Recent financial statements
- ☐ A current board roster
- ☐ An organizational budget and a project budget
- ☐ Written financial and governance policies
- ☐ Banking details, and evidence that grant funds can be held separately

Foundations rarely publish an itemized list, and requirements vary. This is what we see requested most often, not a rule.

If your organization has completed an Equivalency Determination (ED), most of these documents are already on file from that process. EDs lapse, so check that yours is still active before a funder asks. Section 6 explains how a completed ED helps with the next funder.

5 Using AI well, without undermining your case

Your team is probably already using AI tools. The question is where they help with U.S. funders and where they hurt. They help with drafting: a working English draft of an organizational background, a project description, or a budget narrative, which matters most for a team writing in a second language. They also help with the research in section 3: identifying organizations like yours and the U.S. funders that support them, condensing a foundation's guidelines, or pulling from a Form 990-PF the grants that went to your country, at what size and for what purpose. Everything they produce needs your review before it goes anywhere.

The first risk is accuracy. AI tools invent detail: a funder name, a deadline, a program officer, a guideline that does not exist, delivered in the same confident prose as the material that is correct. Nothing an AI tool tells you about a specific funder should be used until you have checked it against that funder's own website or its return.

The second risk is that AI makes your letter sound like everyone else's. A fluent letter now costs nothing to produce, so fluency no longer sets anyone apart. What does set you apart is what AI cannot generate: the funder's own language for the work it funds, a request sized to its grantmaking, and the fit your research established. Use AI to go deeper on the funders you have researched, not to send the same letter to more of them.

6 The compliance question a U.S. funder will raise

At some point in a serious conversation, a U.S. private foundation or donor-advised fund sponsor has to determine how it can legally make a grant to an organization outside the United States. U.S. tax rules give it two routes: an **Equivalency Determination (ED)**, issued by an independent U.S. tax practitioner, and **Expenditure Responsibility (ER)**. Which one applies is the funder's decision, taken with its own advisers.

If your organization has already completed an ED facilitated by Paragon, that work still carries value with new funders. A new funder cannot rely on an existing ED without a formal reissue, but the reissue is a much lighter process than the original ED: Paragon coordinates it directly with the independent U.S. tax practitioner that issued the ED, and your organization is typically asked only to confirm that key facts, such as your legal status and governing documents, have not changed. If your ED has expired, the route is recertification: the original work is updated rather than repeated, so it typically moves faster than a first-time ED. And if your organization does not yet hold an active ED, one can be commissioned proactively, so that an active ED is already in place when funder conversations begin.

Our companion document, **Leveraging Your Equivalency Determination to Secure New U.S. Funding**, covers all three situations, including a template email you can send to a prospective funder.

7 Paragon's role

Paragon does not provide fundraising or referral services. What we do is facilitate the compliance and due diligence steps that arise once a U.S. funder decides it wants to make a grant to your organization. If a funder raises the question of an ED or ER, or asks how a cross-border grant can be made, you are welcome to introduce them to us so that this step does not hold up the grant. Paragon works with U.S. grantmakers of all kinds, including private and family foundations, DAF sponsoring organizations, corporate foundations, and grantmaking public charities.



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