



**Colorado Charter Schools  
Annual Conference**

February 25-27, 2026  
Denver Marriott Tech Center



"If you want to go fast, go alone.  
If you want to go far, go together."  
— African proverb



PRESENTED BY



**D|A|DAVIDSON**  
FIXED INCOME CAPITAL MARKETS

# Prospect Research: Finding Donors and Funders for Your School

**Brianna Quinn,**  
**Director, Fundraising Services and Marketing,**  
**FundEd Strategies**

**Valarie Hunsinger,**  
**Senior Director of Talent & Learning,**  
**FundEd Strategies**

**Pikes Peak**  
**February 26, 2026 | 11am – 12pm MST**  
**Operations, Funding & Budgeting**



“  
The  
conference  
at your  
fingertips.



DOWNLOAD THE APP

# THANKS TO OUR GENEROUS SPONSORS

PRESENTED BY



**D | A | DAVIDSON**  
FIXED INCOME CAPITAL MARKETS

DIAMOND

**JHL**  
CONSTRUCTORS  
BUILDING COLORADO'S FUTURE

**gs**  
Gillem Staffing  
Special Education Staffing



**Staples**



PLATINUM



 GroundFloor Media

  
SPARKSWILLSON, P.C.

# Thank you.

**Room Sponsor**





We make it our priority to **advocate** for high-quality public charter schools across Colorado.

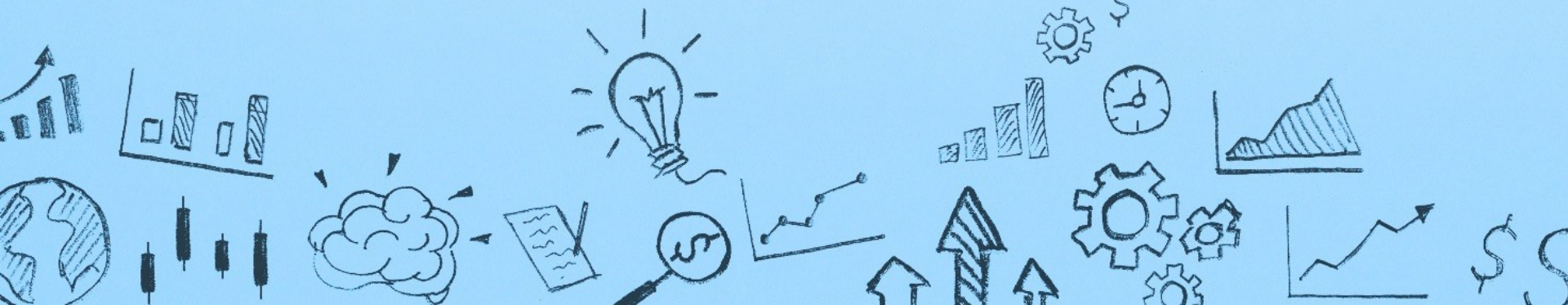


Be a part of the action.



# Prospect Research: Finding Donors and Funders for Your School

**February 26, 2026**



# Presenters



**Brianna Quinn**

FundEd Strategies  
Director, Fundraising Services and  
Marketing  
brianna@fundedstrategies.com




**Valarie Hunsinger**

FundEd Strategies  
Senior Director, Talent &  
Learning  
valarie@fundedstrategies.com

# About FundEd

---

We support schools and education nonprofits to start, scale, and sustain their fundraising programs.



## 90+

We've worked with over 90 public charter schools and networks across the country

## \$200M

Our team has helped our school partners raise and manage more than \$200,000,000 in philanthropy and competitive government grant support

## 21+

Our work is national. We've supported schools in more than 20 states and growing!



# Agenda

1. Learning Objectives (2 minutes)
2. Charter School Fundraising Landscape (3 minutes)
3. Finding New Prospects (40 minutes)
  - a. Individuals
  - b. Corporations
  - c. Foundations
4. Questions (15 minutes)

# Objectives

1. Gain a clear understanding of the **charter school fundraising landscape**
2. Leave with **actionable tools and proven techniques** to identify new individual, corporate, and foundation prospects
3. Discover and select the **strategies** that best fit your school's needs



# The Charter School Fundraising Landscape

# National Fundraising Data

**\$10B**

The total amount Americans gave to K-12 Education in 2024.

**85%**

of charitable giving comes from individuals, bequests, and small family foundations.

**5%**

of non -profit boards list fundraising as one of their strengths.

# The Fundraising Landscape

**75-95%**

of charter school revenue comes from local or state funds

## Why is this important?

- Schools rely on philanthropy to close the operating gap and fund specific projects/programs.
- New schools often have larger operating gaps in the their first 3-4 years (economy of scale).
- Board members and staff must participate in fundraising efforts.
- Individuals are at the core of every decision.

# Finding New Prospects:

## Questions to Help You Prepare





**Below are a list of questions we ask all partner schools in preparation for fundraising efforts. Please take a few minutes to reflect on the following:**

- **Programmatic**

- What is your school known for/what makes your organization unique?
- What are your programmatic priorities?
- Are there key programs and priorities that require funding?
- Who benefits from your work?

- **Fundraising**

- How will you define success/what are your expectations?
- If you are successful, what change or impact will this funding have on your organization?
- What is your timeline for achieving success?

- **Donors/Prospects**

- Who are your current and past donors?
- What is the profile of your ideal donor/funder?
- Are there donors/funders you've already identified as a priority?
- Are there donors/funders you'd prefer to stay away from?

# Finding New Prospects:

## Individuals



# Individuals

## Why this matters:

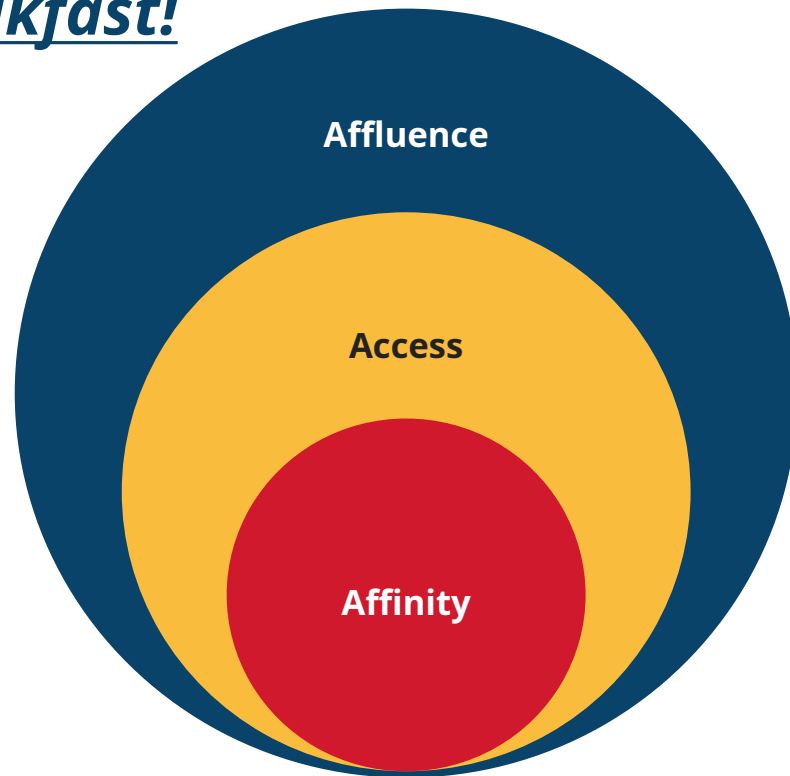
- Warm introductions (through someone you know) dramatically increase giving likelihood.
- Prioritizing the right people (not just the richest people) helps foster long-term relationships and support.
- By engaging all of your stakeholders, you're expanding your network and ensuring equitable fundraising practices.

# Individual Research Starts Here

## Affinity eats Affluence for Breakfast!

### What are the 3 "A's"?

- **Affinity:** Indicates the will to give.
- **Access:** Indicates a relationship that makes giving possible.
- **Affluence:** Indicates that someone can give.



# Individual Research Strategies

## 1. Screening/Reviewing Existing Donors & Parents

- Using wealth screening tools like Kindsight (iWave), DonorSearch, Wealthengine screen existing donors and parents for potential capacity.

## 2. Relationship Mapping

- Conduct relationship mapping exercises with your board, senior leadership, and key stakeholders.

## 3. Exploring Peer Organization Donors

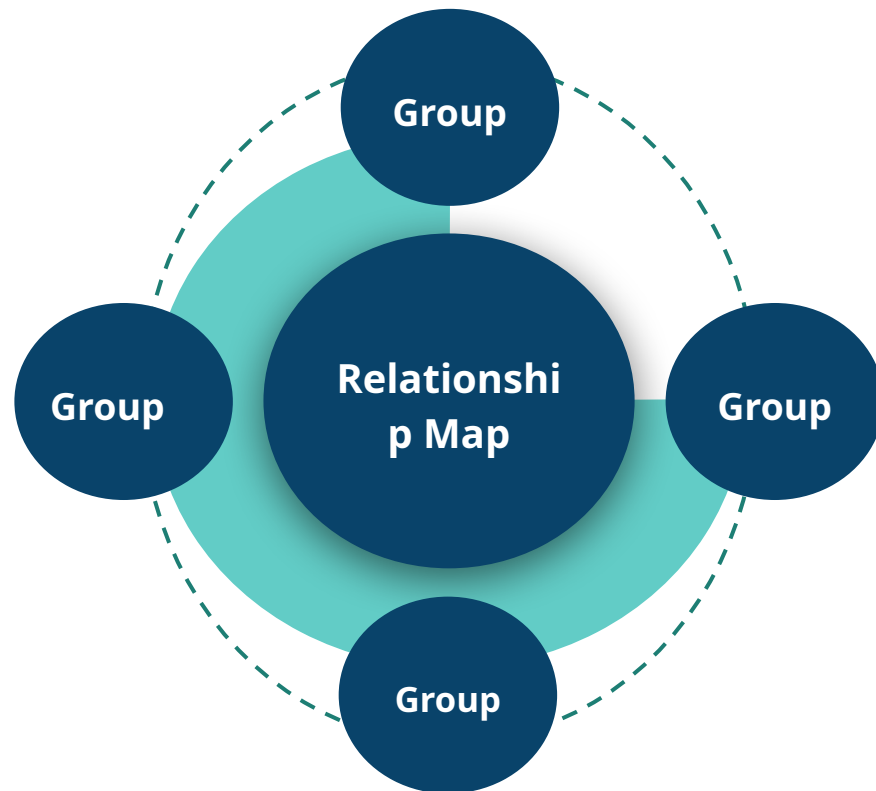
- Have you looked at the donor lists of your peer schools or similar organizations on their websites or in annual reports?
- Review annual reports from peer schools to see who is funding similar work.
- Browse donor walls at community spaces like museums or the YMCA.
- Pull local election and FEC data to identify politically active donors in your area

# Mapping Relationships

**Step 1:** Identify 2-3 groups you, or your supporters, belong to. Write them down.

## Examples include:

- College alumni group
- Place of Employment
- Other Boards
- Gyms/Sports
- Community organizations
- Places of Worship

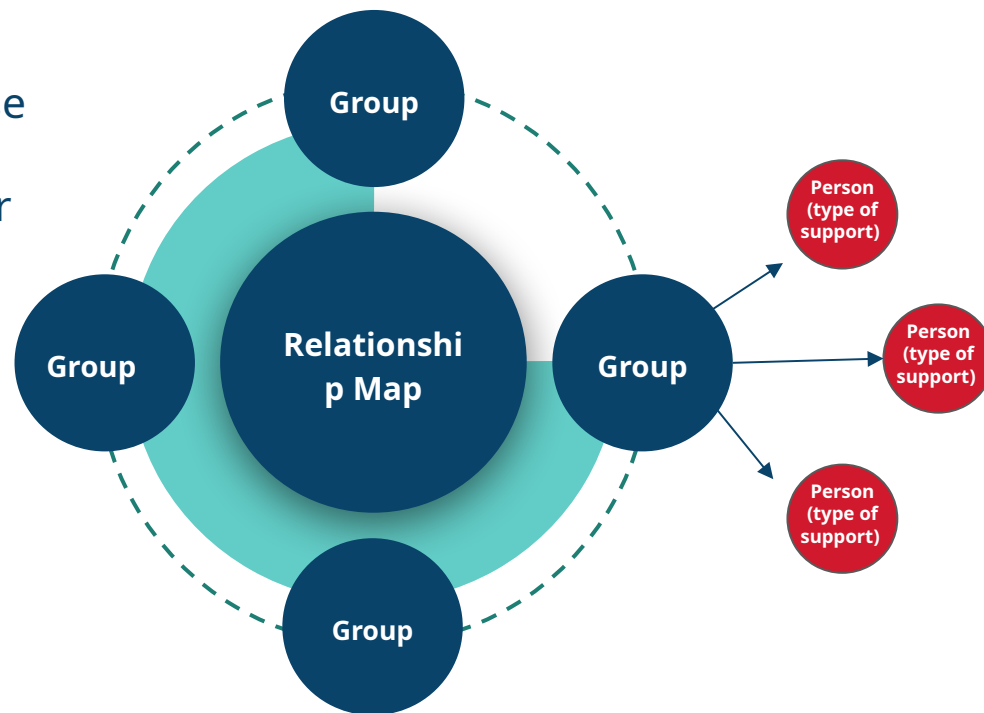


# Identify Connections

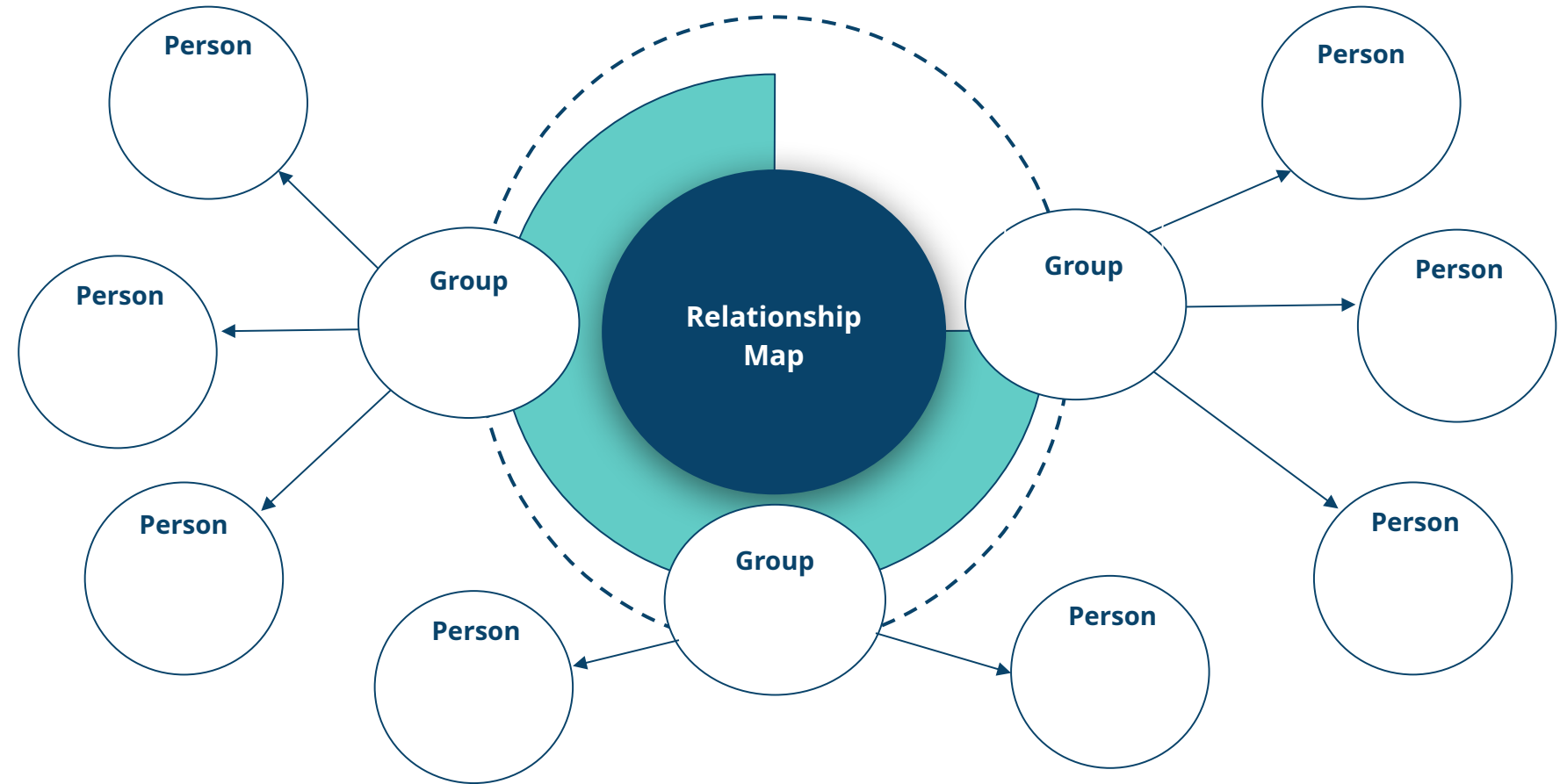
**Step 2:** Identify 1-3 people from these groups and indicate what type of support they could provide to further your school's mission.

Types of Support:

- Time
- Talent
- Treasure
- Testimony
- Ties



# Practice on Your Own



# Other Sourcing Strategies

**Points of Entry and Engagement.** Host “friendraisers” each year. These can include fun runs, school tours, volunteer opportunities, or family events. These activities bring people closer to your work and help build stronger relationships across your network.

**Lead with the Relationship.** Yes, identify who might have the capacity to give but remember relationships are key. Start with simple searches on Google, LinkedIn, or social media, or use specialized platforms such as Kindsight or Donor Atlas for more detailed insights.

**Leverage Newsletters/Communications.** Are you making the most of your external communications, like newsletters and annual reports? Regularly encourage people to sign up, and be sure to add new contacts after events/connecting. If you already send a newsletter, review the engagement data. During campaign seasons such as year end, reach out to your list to invite their participation.

# Finding New Prospects:

## Corporations & Local Businesses



# Businesses

## Why this matters:

- 65% of Fortune 500 Companies offer employees matching gift opportunities, an estimated \$4B of which goes unclaimed each year
- Corporate partnerships go beyond money including event sponsorship, volunteering, and internship opportunities

# Corporate

## Why this matters:

- Corporate partnerships go beyond money including event sponsorship, volunteering, and internship opportunities
- 65% of Fortune 500 Companies offer employees matching gift opportunities, an estimated \$4B of which goes unclaimed each year

# Strategies to Identify Companies

## Identify Points of Entry and Engagement

- Clearly identify your volunteer opportunities (read alouds, science fairs, gardening days, etc).
- Walk around your neighborhood and create a list of businesses in your community (round-up campaigns)

## Collect Data

- Add employer name on your donation forms, volunteer sign in sheets, and student registration forms.

## Leverage Online Tools

- Review websites such as [Double the Donation](#) to learn more about local corporate giving.

# Strategies to Identify Companies

## Scour Other Organization's Data

- Check the websites and social media of your peer or competitor schools.
- Grab the program from the local theatre's most recent event or check out donor walls
- Check annual reports and event sponsorship materials

**Levages AI.** Ask ChatGPT to pull a list of companies with a footprint in your community and that may be aligned with your mission.

- *E.g. I lead an STEM focused charter high school in Charlotte, NC and I'm looking to build a list of companies that have a footprint within 50 miles of my school, aligned with our priorities, and have Corporate Social Responsibility commitment. Please provide a list of 10-20 companies that I could reach out to and indicate how they are aligned*

# Corporate Engagement Matrix

Stakeholders	Interest & Motivations	Barriers & Concerns	Capacity	Potential Activities
<b>Up-and-Coming Champions</b> <i>E.g. Google</i>	STEM Career Skills Exposure Loves education	Dabbling support in a number of organizations	Lots of time Medium resources and access	Alumni networking event Teacher Appreciation Week
<b>Long-term Champions</b> <i>E.g. MCN Build</i>	Vendor Career/Workforce Invested in Charter Education	Business relationship can change at any time Perceived conflicts of interest	Limited time, medium resources, access, and influence Tends to support charter clients	Career Skills workshop Internships Event sponsorship
<b>Trailblazers (volunteers)</b> <i>E.g. Nike (Local Store)</i>	Athletics School-based projects/events	Staff availability during the work week versus weekend	Lots of time and limited resources	Campus Beautification March Madness Sisterhood Summit
<b>Event Sponsors</b> <i>E.g. Accenture</i>	College initiatives Career workforce STEM	Almost no time	Limited time, lots of resources, month, and influence	Mentorships Sisterhood Summit
<b>Financial Resources</b> <i>E.g. Trust</i>	Career Pathways STEM Entrepreneurship	National Company Limited Time Competitive grant	Lots of resources, opportunity for time and volunteers	Sisterhood Summit Pathways Program Trailblazers Program

# Finding New Prospects:

## Private Foundations



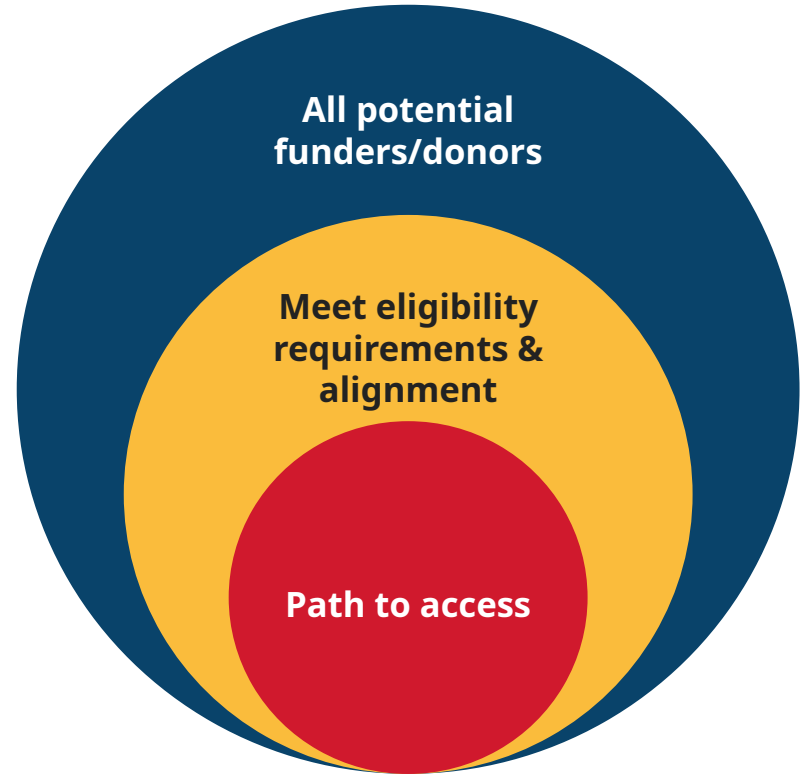
# Foundations

## Why this matters:

- Foundations offer mission-aligned, sometimes multi-year, funding
- Having the support of one foundation signals credibility to other foundations
- Strategic research increases your chances of success

# Foundation Research Starts Here

Cast the widest net possible and further refine through additional research & qualification, over-time



# Generating Lists

1. Utilize [Candid](#), [Inside Philanthropy](#), and [Instrumentl](#)
2. Prompt AI tools: [ChatGPT](#), [Claude](#), etc.
3. Using the information gathered, start searching the following
  - Funders of organizations your school partners with
  - Funders of similar organizations/schools
  - Funders of priority areas/school programs
4. Add names and high-level details to a [prospect research tracker](#)
  - Track: foundation name, location, giving history or capacity, aligned interests or causes they support, and any relevant deadlines or ideas for engagement.
  - Include notes from your relationship maps including board members, staff, families, or alumni who can provide introductions.

# Engagement and Research Strategies

## Points of Entry and Engagement

Identify foundations that match your school's mission (e.g., STEM, literacy, equity). Attend workshops, networking events, or webinars hosted by foundations to introduce your school and staff.

## Understand the Relationship.

Track any connections between your board, staff, or supporters and foundation staff or trustees. Ask for warm introductions whenever possible.

## Qualify & Identify Next Steps

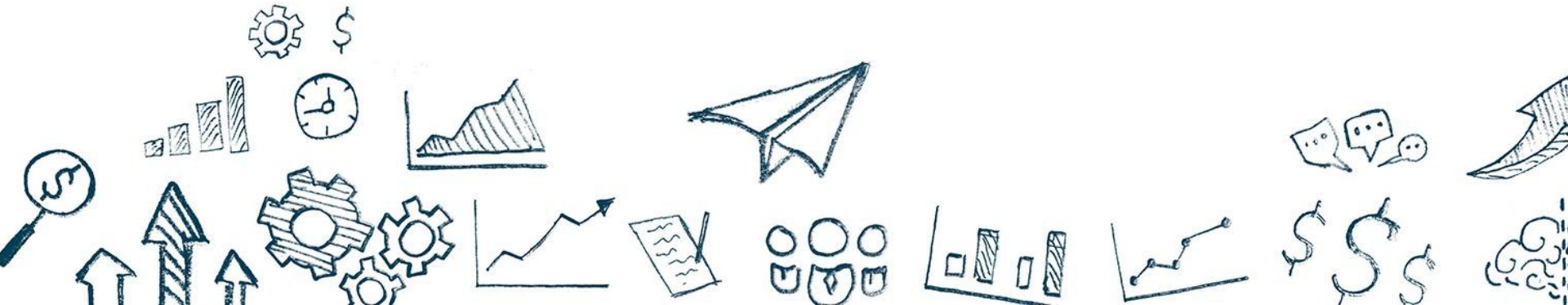
Assess alignment and qualify or disqualify

# Cost of Databases and AI Tools

Tool	Purpose	Cost
<b>Claude</b> (claude.ai)	Research, grant writing, donor communications, strategic planning	Free / \$20 mo
<b>ChatGPT</b> (openai.com)	Drafting, brainstorming, general writing tasks	Free / \$20 mo
<b>Perplexity</b> (perplexity.ai)	Quick research with cited sources, company/foundation lookups	Free / \$20 mo
<b>Instrumentl</b> (instrumentl.com)	Foundation discovery, grant tracking, deadline management	From \$179 mo
<b>Candid</b> (candid.org)	Foundation 990 research, giving histories, trustee information	From \$42 mo
<b>Donor Atlas</b> (donoratlas.com)	Individual prospect research, wealth indicators, giving history	From \$99 mo
<b>Kindsight</b>	Individual prospect research, wealth indicators, giving history	From \$345 mo



# Questions





# Appendix

# Open Source Tools & Resources

## Articles and Presentations

- [Phase 1: Research & Ranking](#)
- [Phase 2: Strategy & Cultivation](#)
- [Phase 3: Proposal Writing & Stewardship](#)
- [Recording from NCSC22 - Campaigns](#)
- [Individual Giving from NCSC23](#)
- [Fundraising Planning from NCSC24](#)

## Examples and Templates

- [Concept Note Guiding Questions](#)
- [Concept Note Example](#)
- [Grants Readiness Checklist](#)
- [Fundraising Action Plan](#)
- [Charter School Resources and Examples](#)
- [Fundraising Priorities One-Pager](#)
- [Campaign Planning Tool](#)
- [Relationship Mapping Exercise](#)
- [Relationship Mapping Tool](#)

# Instrumentl: From Search to Pipeline in Minutes

1. Set Up Your Project: Enter your mission, programs, location, and funding needs. Instrumentl uses this to auto-match relevant opportunities.
2. Review Smart Matches: Browse grant opportunities scored by alignment. Filter by deadline, amount, funder type, and eligibility
3. Save & Track: Move top matches into your tracker. Set deadline reminders, assign team members, and note application status.
4. Forecast & Report: Use the pipeline view to project revenue and share progress with leadership and board.

instrumentl

Link to Best Practices: <https://www.instrumentl.com/blog/grant-re>

# Candid (Foundation Directory): Deep Foundation Intelligence

1. Search by Focus Area: Filter for "K-12 education," "charter schools," or your program areas. Narrow by geography, grant range, and type.
2. Analyze Funder Profiles: Review a foundation's giving history, top grantees, average award size, and stated priorities. Check 990 data for trends.
3. Find "Who Else They Fund": Identify foundations already giving to peer charter schools — these are warm prospects with demonstrated alignment.
4. Build & Export a Prospect List: Save top foundations to a project list. Export data for your CRM or tracking spreadsheet.

The logo for Candid, featuring the word "Candid." in a bold, black, sans-serif font centered on a bright yellow rectangular background.

**Candid.**

Link to Best Practices: <https://www.instrumentl.com/blog/grant-research-best-practices>

# ChatGPT (OpenAI): Foundation Research & Grant Readiness

1. Discover Aligned Foundations: Ask ChatGPT to search for foundations that fund charter schools, K-12 education, or your specific program areas in your state or region. Request details on mission alignment, typical grant size, and application process.
2. Analyze 990s & Giving Patterns: Upload a foundation's 990 tax filing (PDF) or ask ChatGPT to summarize total giving, top grantees, average award size, geographic focus, and trends over time, no manual spreadsheet work required.
3. Evaluate Fit & Prioritize: Paste a foundation's guidelines or RFP and ask: "How well does our charter school align with this funder's priorities?" ChatGPT can score alignment and flag gaps to address in your proposal.



Prompt: ""Search for private foundations in CO that have awarded grants to charter schools or K-12 education nonprofits. For each, list their focus areas, typical grant range, and how to apply.""

# Claude (Anthropic): Your AI Research Analyst

1. Research Individual Prospects: Filter for "K-12 education," "charter schools," or your program areas. Narrow by geography, grant range, and type.
2. Identify Aligned Foundations: Prompt Claude with your school's mission and ask it to search for foundations that fund charter schools, K-12 education, or your specific program areas in your region.



Prompt: "Search for foundations in Colorado that have funded charter schools or K-12 education programs in the last 3 years. Summarize each one's focus, typical grant size, and how to apply."

# Perplexity AI: Real-Time Sourced Research

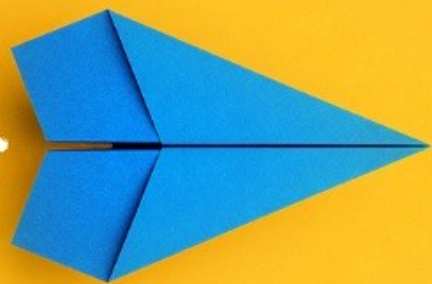
1. Foundation Discovery: Search for foundations by focus area and geography. Ask follow-up questions to drill into giving history, recent grants, and application processes.
2. Search a prospect's name and ask: "Tell me about this person's philanthropic history, board memberships, and wealth indicators." Perplexity returns a sourced summary with clickable citations.



Prompt: "What foundations in Colorado have awarded grants to charter schools in the past two years?"



[www.Linkedin.com/company/FundEdStrategies/](https://www.linkedin.com/company/FundEdStrategies/)



FundEd  
STRATEGIES

“  
**Your  
feedback  
helps us all  
move forward  
together**



**Colorado League of  
Charter Schools**

Each time you take the survey you can enter to win prizes