



*Kasih Initiative*

3 Keys to

# Resilient Fundraising in a Shifting Landscape

Conservation Lands Foundation: Friends Summit 2026

*Stephanie Tanny & Randall Navarro | Kasih Initiative*

# Who We Are

**Kasih Initiative** is a strategic grant writing and development firm. Founded in 2020 and based in Denver, we have raised over **\$100 million** across federal, state, and private sources for nonprofits, government agencies, and national coalitions.



## Stephanie Tanny

President & Founder

- 20+ years in nonprofit leadership & development
- Raised \$2 million while still in college
- Former Development Director at Colorado Immigrant Rights Coalition & Voces de la Frontera
- TEDxMileHigh speaker; has shared the stage with President Clinton & John Oliver



## Randall Navarro

Director of Grant Strategies

- 20+ years as a high-impact fundraiser
- \$100M+ raised for state agencies and municipalities
- Federal grants expert: conservation, infrastructure, healthcare, social justice
- Deputy Director, National Wildlife Federation HECHO Program
- Executive Director, Clear Creek Greenway Authority



# Today's Agenda



01

## Key 1: Strategy

Strategic planning, fundraising plan & budget strategy



02

## Key 2: Systems

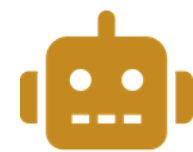
Document organization, grant tracker & Airtable demo



03

## Key 3: Support

Funder relationships, your team & AI tools



04

## AI Overview

Strengths, weaknesses & best use cases for fundraising

05

## What Now?

Hiring decisions, next steps & Q&A

*Yes, another fundraising workshop.*

# And why this matters to you!

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*Here's what makes this one actually worth staying awake for:*

## **01** The funding landscape has changed... and will continue to.

How to diversify your revenue streams and leverage funds.

## **02** Tools, not just theory. (You'll get copies at the end)

Budgets built to win grants, not just balance books. Project management tools that are not expensive. Real templates. Practical systems.

## **03** Fundraising is everyone's job. Yes, everyone.

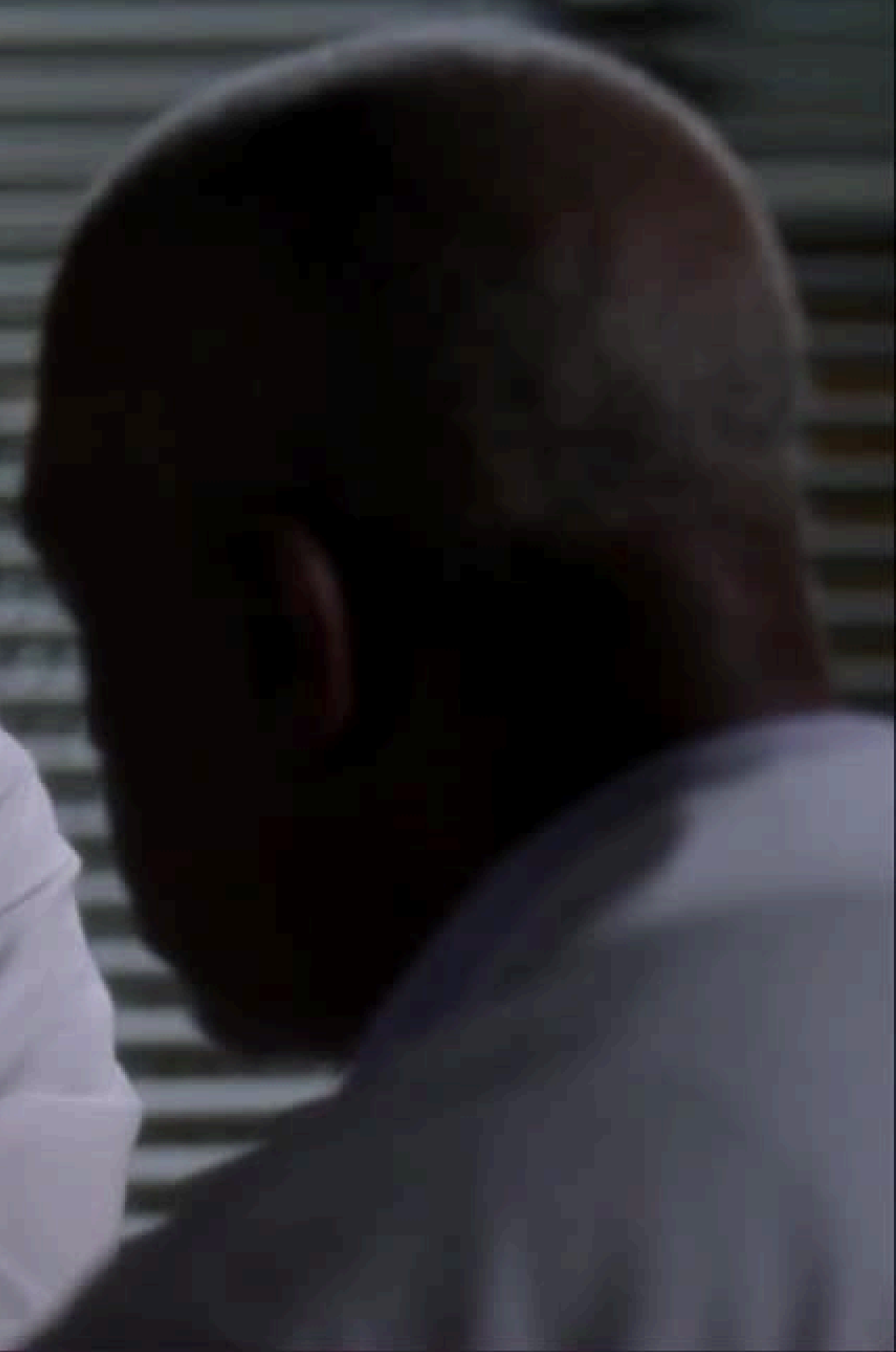
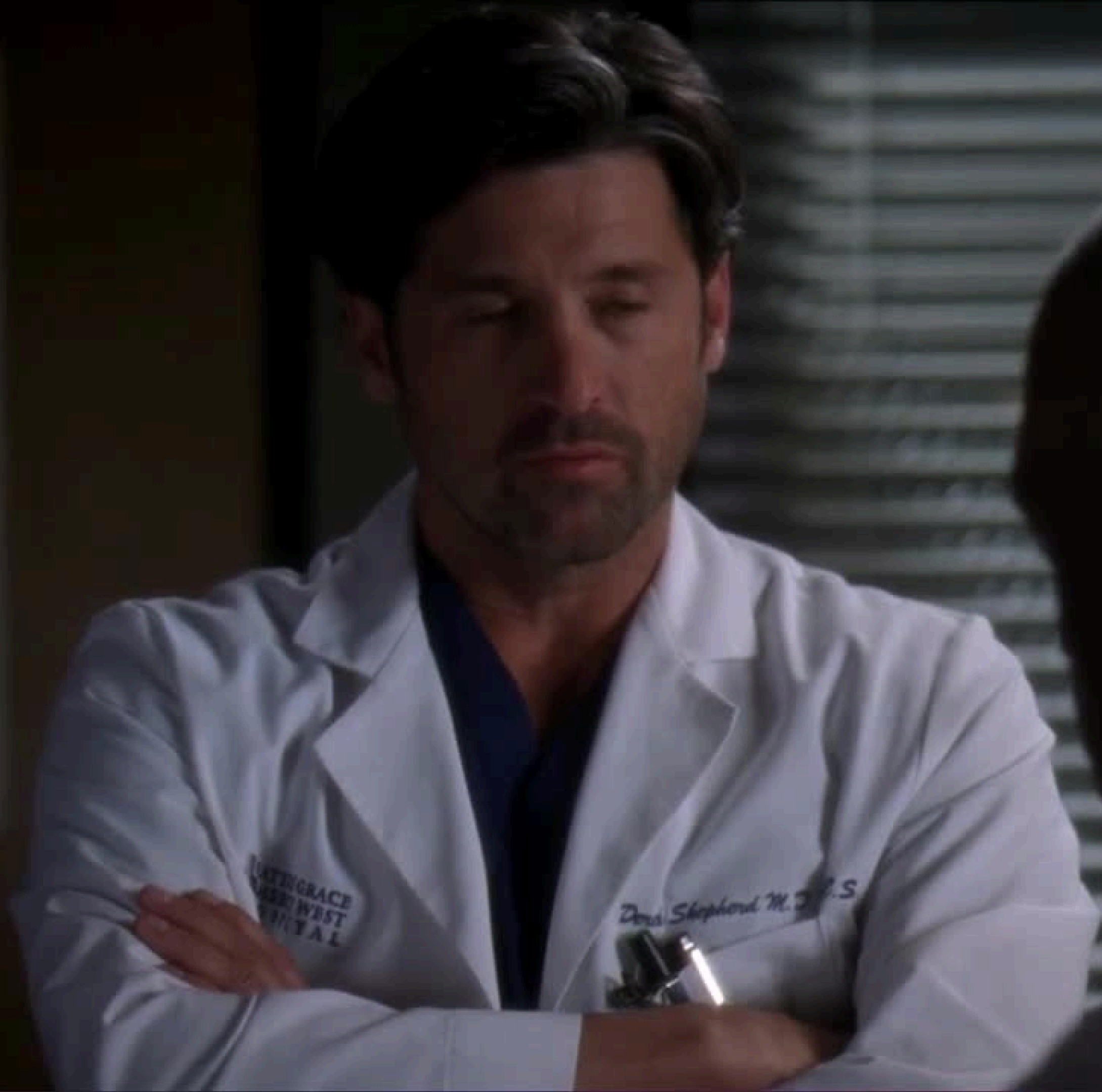
Your ED, your board, your program staff. We'll show you how to make it simple — not a second full-time job.

## **04** AI: the good, the bad, and the 'wait, it did what?'

Where AI is a genuine superpower — and where it can quietly tank your grant application without you knowing.



**Has this ever happened to you?**



KEY 1

# Strategy



Strategic Planning  
Fundraising Plan  
Budget Strategy

# Strategic Planning

*It's a plan — not a wish or an idea.*



## Start with a Mission & Vision

This is about you... but not **just** about you!



## Specificity is Paramount

A strategic plan is like a trail map for a hike: it does not need to explain how to use your legs, but it should include enough signs so your team does not end up three hours off trail arguing about whether the destination was “more of a mindset.”



## Commit to the Plan

A strategic plan is only valuable if it guides decisions.

KEY 1

# Strategy



Strategic Planning  
Fundraising Plan  
Budget Strategy

# Your Fundraising Plan

*Clear goals. Realistic targets. Diversified streams.*

## Revenue Goals

Set annual targets by funding stream

## Grant Calendar

Map deadlines 12 months out

## Funding Mix

Federal, state, private, individual

## ROI Analysis

Which streams yield the most return?

## Diversification

Never rely on a single funder

## Landscape Analysis

Who funds work like yours?

**Tip:** How to pick the right fundraising types for YOUR organization — ROI matters.

KEY 1

# Strategy



Strategic Planning  
Fundraising Plan  
Budget Strategy

# Budget Necessities

## Two Approaches

Build from programs up (program budgets → total org budget), OR allocate from org budget down to programs.

## Admin vs. Programs

Understand what funders will and won't cover. Indirect/overhead rates matter. Know your ratios.

## Program Breakdown

Each program needs its own budget with clear personnel, direct, and indirect costs itemized.

## Leveraging Match Funds

Federal grants often require match. Private grants can serve as match for federal — understand the rules.

**This MUST be done ASAP at the beginning of each year!**

# Budget Template

Sample 2026 Budget									
	Operations / Administration	National Monument	Outdoor Education	Greenway Trail	Invasive Species	Wildlife Crossing	Combined Program Costs	Total	% of Overall Revenues
<b>Revenue</b>									
4000 - Contributions	\$4,000	\$1,500	\$1,500	\$1,500	\$1,500	\$1,500		\$11,500	0.84%
4010 - Individual Contributions	\$4,000		\$20,000					\$24,000	1.75%
4020 - Corporate Contributions	\$6,000	\$10,000						\$16,000	1.17%
4030 - Events	\$2,000		\$2,000	\$2,000	\$2,000	\$2,000		\$10,000	0.73%
<b>4210 - Private Grants</b>	<b>\$47,000</b>	<b>\$50,000</b>	<b>\$105,000</b>	<b>\$0</b>	<b>\$80,000</b>	<b>\$0</b>		<b>\$282,000</b>	<b>20.58%</b>
Packard Foundation	\$2,000	\$50,000	\$60,000					\$112,000	
Bezos Earth Fund	\$40,000				\$80,000			\$120,000	
Rivian Foundation	\$5,000		\$45,000					\$50,000	
<b>4220 - Government Grants</b>	<b>\$102,000</b>	<b>\$0</b>	<b>\$75,000</b>	<b>\$250,000</b>	<b>\$0</b>	<b>\$600,000</b>		<b>\$1,027,000</b>	<b>74.94%</b>
Federal	\$60,000			\$200,000		\$400,000		\$660,000	48.16%
State/Local	\$42,000		\$75,000	\$50,000		\$200,000		\$367,000	26.78%
<b>Total Revenue</b>	<b>\$165,000</b>	<b>\$61,500</b>	<b>\$203,500</b>	<b>\$253,500</b>	<b>\$83,500</b>	<b>\$603,500</b>		<b>\$1,370,500</b>	<b>100.00%</b>
<b>Expenses</b>									
<b>7200 - Salaries &amp; Related Expenses</b>	<b>\$22,000</b>	<b>\$50,000</b>	<b>\$45,000</b>	<b>\$40,000</b>	<b>\$35,000</b>	<b>\$60,000</b>	<b>\$230,000</b>	<b>\$252,000</b>	
Executive Director	\$20,000	\$10,000	\$20,000	\$20,000	\$10,000	\$20,000	\$80,000	\$100,000	
Campaign Coordinator	\$2,000	\$40,000					\$40,000	\$42,000	
Community Organizer				\$20,000		\$40,000	\$60,000	\$60,000	
Other Staff			\$25,000		\$25,000		\$50,000	\$50,000	
7500 - Contract Service	\$5,000	\$1,000	\$2,000	\$2,000	\$2,000	\$2,000	\$9,000	\$14,000	
8100 - Vehicle Maintenance			\$1,000	\$2,000			\$3,000	\$3,000	
8300 - Travel & Meetings	\$500	\$10,000	\$6,000				\$16,000	\$16,500	
8400 - Marketing & Events	\$200					\$1,500	\$1,500	\$1,700	
8500 - Other							\$0	\$0	
<b>Total Expenses</b>	<b>\$27,700</b>	<b>\$61,000</b>	<b>\$54,000</b>	<b>\$44,000</b>	<b>\$37,000</b>	<b>\$63,500</b>	<b>\$259,500</b>	<b>\$287,200</b>	
<b>% of Overall Costs</b>	<b>9.64%</b>						<b>90.36%</b>		
<b>Net Revenue/Deficit</b>								<b>\$1,083,300</b>	

# Clear Creek Greenway Trail (Peaks to Plains Trail)

3 Years

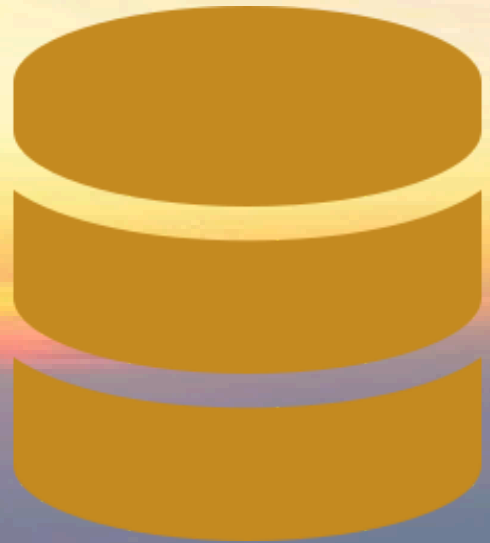
- 26 Miles of Trail Master Planned
  - 13 Segments
  - 4 Bridge Crossings
- 3 Segments and 2 bridge crossings planned and built - including NEPA compliance
- Total Cost - \$5.5 million

**Total funds provided through  
the local municipality -  
\$15,000**



KEY 2

# Systems



Document Org.  
Grant Tracker  
Airtable Demo

# Organization of Key Documents

*If you can't find it in 30 seconds, your system isn't working.*



## Common Attachments

W-9, Impact Reports, Board Lists, Letters of Support, Org Chart



## Financials

990s, Profit & Loss Statements, Audits, Program Budgets



## Grants by Funder

Submitted applications, award letters, grant contracts



## Reports & Deadlines

Reporting calendar, submitted reports, funder correspondence

**Pro tip:** Use a shared Google Drive or SharePoint folder with consistent naming conventions.

KEY 2

# Systems



Document Org.  
Grant Tracker  
Airtable Demo

## Fundraising Tracker: CRM vs. Project Management

	CRM (e.g., Salesforce, Bloomerang)	Project Management (e.g., Airtable)
Cost	\$\$\$ – Often \$100–\$500+/mo	\$ – Free to low cost
Best For	Donor management & major gifts	Grant tracking & reporting
Complexity	High – significant setup & training	Low – intuitive, customizable
Small Org Fit	<i>Often overkill</i>	✓ <b>Recommended</b>
Track Deadlines	Limited without customization	✓ <b>Built-in views</b>
Reporting	Donor reports & receipts	Grant status & compliance

**Simplicity is the priority!**

AIRTABLE DEMO

# Your Grant Tracker in Action

Funder	Opportunity	Deadline	Status	Requested	Received	Report Due
Conservation Lands Foundation	Ecosystem Grants 2025	03/01/25	Submitted	\$75,000	—	12/01/25
USDA Forest Service	Community Forest Program	04/15/25	Awarded	\$150,000	\$150,000	06/30/25
Gates Foundation	Environmental Justice	05/30/25	In Progress	\$50,000	—	—
State DOLA	Capacity Building Grant	06/01/25	Prospecting	\$25,000	—	—

*[ Live Airtable demo — switch to browser ]*

Track: Funder · Opportunity · Deadlines · Status · Amount Requested · Amount Received · Reporting Deadlines

KEY 3

# Support



Funder Relationships  
Your Team  
AI Tools

# Building Funder Relationships

*Grants are relationships — not transactions.*



## Cultivate Before You Apply

Introduce your organization, attend site visits, and connect at conferences. Funders fund people they trust.



## Strategic Alignment

Don't apply to every funder. Apply to the ones whose priorities genuinely match your work — and make that alignment clear.



## Feedback Loops

When you don't win, ask for feedback. Funders respect organizations that learn and adapt.



## Maintain Existing Relationships

Reports are more than compliance — they're an opportunity to deepen trust. Submit on time, highlight wins, flag challenges early.

KEY 3

# Support



**Funder Relationships**  
**Your Team**  
**AI Tools**

# Your Team

*Fundraising is a team sport — everyone has a role.*



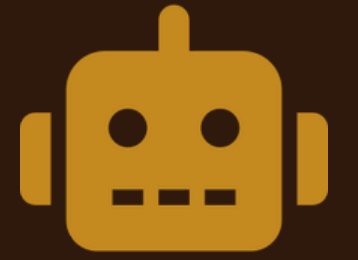
**Program experts:**  
Provide background and budgeting for applications, facts and figures for reporting and compliance



**Network Builders:**  
Provide them with materials and information to make them confident and motivated!



**Executive Director/CEO:**  
Owns the funder relationship. Sets the culture.



# AI: Strengths & Weaknesses

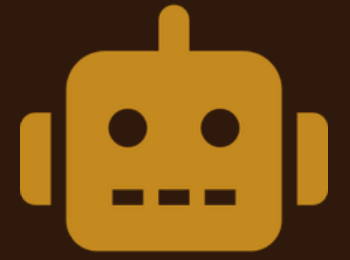
## ✓ AI Strengths

- Quickly synthesizes large amounts of information
- Generates strong first drafts
- Helps tailor language to different funders and priorities
- Speeds up research
- Assists with budgets, timelines, logic models, and outcome framing
- Helps maintain consistency across long applications with multiple contributors
- Can rapidly brainstorm framing, headlines, hooks, and narrative approaches
- Reduces administrative bottlenecks so teams can focus on strategy and relationships

## ✗ AI Weaknesses

- Build authentic relationships with funders
- Distinguish between what sounds good and what is actually true or feasible
- Capture lived experience, organizational voice, or emotional nuance on its own
- Make strategic decisions about positioning, timing, or funder fit
- Reliably verify facts, budgets, statistics, or compliance requirements without review
- Replace deep program knowledge or leadership insight
- Recognize political sensitivities, power dynamics, or organizational history consistently
- Know when not to say something

# AI Considerations for Nonprofits



## Who Else Is Using AI?

- Funders receive hundreds, sometimes thousands, of applications per cycle.
- Many funders are already using AI-assisted systems to sort, flag, and prioritize applications.
- If your proposal is generic, repetitive, or clearly AI-generated, there is a good chance it will blend into the “maybe later” pile.
- AI can help you scale your writing, but it can also scale mediocrity very efficiently.

## Pitfalls & Red Flags

- Be cautious of “\$200/month unlimited grant writing” platforms promising instant proposals.
- Cheap AI-generated grants can become very expensive if they reduce your win rate.
- A fast bad proposal is still a bad proposal. It just arrived earlier.
- AI should strengthen your competitive edge, not flatten your organization into the same tone and language everyone else is using.

# What Now?

*Making smart decisions about how to get the help you need.*

	Full-Time Staff Hire	Part-Time Support (Employee or Consultant)	Firm (like Kasih)
Cost	\$\$\$\$ — Salary, benefits, overhead	\$\$ — Lower salary or hourly/project-based	\$\$\$ — Retainer-based, predictable
Expertise	Depends on hire; one person's skillset	Limited by hours or scope; one person's skillset	Broad team expertise across funders, sectors, and strategy
Flexibility	Low — fixed role, hard to scale up or down	Moderate to High	High — scale services up or down as needs shift
Onboarding Time	3–6 months to ramp	1–6 months to ramp	2–4 weeks; systems built to onboard fast
Strategic vs. Execution Fit	Execution only; strategy depends on the person	Execution; strategy varies	Strategic partner + execution
Best when...	High grant volume + 3+ year stability	Moderate needs or a specific project	You have strong funder relationships and need strategic capacity to convert them into funded proposals



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# Q&A Time

A scene from the movie 'The Green Mile' showing two men in a prison setting. One man is placing his hand on the shoulder of another man. The text 'You are not alone!' is overlaid on the image.

**You are not alone!**



# Next Steps

Step 1. Scan and enter email to receive the recording + development tools:



Step 2. Sign up for office hours later today (limited spots available)  
3:30pm - 5:30pm

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