Webinar: Harnessing Private Foundation Funding to Support Your Research and Education Activities

• An ESA Training Initiative, funded by NSF
• Relevant skills training for project leaders in:
  • Financial management & fundraising
  • Strategic planning
  • Communication & stakeholder management
• Interactive, hands-on learning
• esa.org/sbi/

“We have gone from approx. $2M in current grants in 2015 to $12M in 2019. We have also endowed the collection manager positions. At the same time we have made the operation leaner and more sustainable, with a 3-year collection strategic plan and new understanding and enthusiasm by the Board for collections and collection-related research. I found the SBI course to be quite valuable.”
Upcoming Events

ESA Annual Meeting:
• Harnessing the Ecological Data Revolution
• Latebreaking poster abstracts due: April 30
• [www.esa.org/saltlake/](http://www.esa.org/saltlake/)
• SBI Events at the Annual Meeting
  • Social networking hour (Wednesday evening)
  • Workshop on developing logic models (Thursday lunchtime)

Upcoming SBI Course:
• Fall 2020 Online: Strategies for Success (online)
• [esa.org/sbi/strategies-for-success/](http://esa.org/sbi/strategies-for-success/)
Contact Us

Bill Michener: William.Michener@gmail.com

SBI Training Initiative:

🌐 www.esa.org/sbi
✉️ sbi@esa.org
🐦 @esa_sbi

Download the handout
Housekeeping Notes:

- Use the questions pod to enter questions
- Use the chat box to message the organizers
- Please stay muted
- Thank you!
Harnessing Private Foundation Funding to Support Your Research and Education Activities

William Michener
University of New Mexico
Roadmap

• Why tap foundation funding?
• What do foundations do/want?
• Where do I find relevant foundations?
• How do I get foundation support?
Why tap foundation funds?

This Photo by Unknown Author is licensed under CC BY-SA-NC
Typically, one substantial source of income

Like a single-legged stool...

Think about the strengths and weaknesses of this one, key funding source
Second leg of the stool...
Often the best opportunity for growth

- Government contracts
- Earned income
- Support from our institution
And there is an obvious third leg
Private grants: foundations and corporate

Worth exploring because:

• Have grant guidelines we can research
• Have staff / build relationships
• Used to funding professional organizations
• There are many, many foundations
Foundation Trends

- Two-thirds of foundations are family foundations
- Growth is driven by the rich and tax incentives / disincentives
- Average grants continue at $35K - $50K
FDO Quick Start is your answer for looking up information on any U.S. foundation on your prospect list.

Find the foundation you're looking for by name, EIN, location, and assets or giving range.

Search the IRS Forms 990 and 990-PF for those funders by those facets or by keyword.
What do foundations do/want?
Accomplish Priorities
Gain Visibility
Create Lasting Change

Image: Pittsburgh Post-Gazette
Most foundations relate to “people outcomes”

• Yeast Collection that serves as a national & international reference and sample source
  – 0 --“yeast”
  – 2,547 -- “training” + “college” + “science”
Matching Our Priorities
Who benefits?

Training, education, jobs

Strengthen the workforce: conferences, techniques, gear

Improve ability to solve a societal problem
Where do I find relevant foundations?
We can check out foundation priorities to find a match

**The Talk:**
Guidelines and Websites

**The Walk:**
Search Engines and IRS Forms
Find Funding

SHOWING RESULTS FOR "Natural resources, Ecology, Wildlife biodiversity, Environmental and resource rights, Environmental studies, Climate change, Agroecology, New Mexico (United States), Economically disadvantaged people"  CLEAR ALL  EDIT

Search for grants related to "ecology new mexico".

184 Grantmakers
1,025 Grants
247 Recipients
4,009 990 Tax Forms

View Grantmakers Only
View Grants Only
View Recipients Only
View 990 Tax Forms Only

Total Dollar Value of Grants: $172,949,955

Grantmakers (184)

<table>
<thead>
<tr>
<th>Grantmaker</th>
<th>City</th>
<th>State</th>
<th>Country</th>
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<th>Total Giving</th>
<th>Amount Funded</th>
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<td>N/A</td>
<td>N/A</td>
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Grants (1,025)
McCune Charitable Foundation

Santa Fe, NM, United States | www.nmccune.org | Who's Who | + Contact Info

McCune Charitable Foundation Most Recent 5 Years At A Glance

They've funded 1,250 grants to 502 organizations totaling $20,814,201

What Is Being Funded?

<table>
<thead>
<tr>
<th>Category</th>
<th>Funding Amount</th>
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</thead>
<tbody>
<tr>
<td>Community and economic development</td>
<td>$5M - $7M</td>
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<tr>
<td>Arts and culture</td>
<td>$5M - $7M</td>
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<tr>
<td>Human services</td>
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<td>Environment</td>
<td>$5M - $7M</td>
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<td>Education</td>
<td>$5M - $7M</td>
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<td>Public affairs</td>
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<td>Health</td>
<td>$5M - $7M</td>
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<td>Philanthropy</td>
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<tr>
<td>Public safety</td>
<td>$5M - $7M</td>
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<tr>
<td>Agriculture, fishing and forestry</td>
<td>$5M - $7M</td>
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</table>

Where Is The Money Going?

- View Each State with More Detail

How Big Are The Grants?

- View Each Grant with More Detail

MOST COMMON GRANT AMOUNT: $10,000
<table>
<thead>
<tr>
<th>Grantmaker</th>
<th>Recipient</th>
<th>Recipient City</th>
<th>Recipient State</th>
<th>Recipient Country</th>
<th>Primary Subject</th>
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<td>United States</td>
<td>Land resources</td>
<td>2015</td>
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</tbody>
</table>
Find Funding

SHOWING RESULTS FOR "Science, Faculty and staff development, Capacity-building and technical assistance"

1,481 Grantmakers

21,645 Grants

4,054 Recipients

3,905 990 Tax Forms

Total Dollar Value of Grants: $6,672,481,266

Grantmakers (1,481)

United States National Institutes of Health

Bethesda MD United States N/A N/A $2,296,917,026 7,577

United States Department of Health and Human Services

Washington DC United States N/A N/A $742,463,722 2,430

United States National Aeronautics and Space Administration

Washington DC United States N/A N/A $282,668,742 1,056

National Science Foundation

Arlington VA United States N/A N/A $535,781,333 745

United States Federal Highway Administration

Washington DC United States N/A N/A $146,884,353 502

Grants (21,645)

Recipient

Recipient City

Recipient State

Recipient Country

Primary Subject

Year

Grant Amount
How do I write a grant proposal for my individual project? Where can I find samples?

Remember one important rule: "If you don't qualify, don't apply." Foundations that give to individuals have highly specific criteria. This article gives a typical breakdown for an individual project proposal.

Few proposal writing resources are specifically for individual grantseekers. Foundations that give to individuals have highly specific criteria, so creating a comprehensive "how-to" guide is hard.

If you don't qualify, don't apply

Remember one important rule: If you don't qualify, don't apply. Approach only foundations that have demonstrated interest in your field and geographic area. These funders are more likely to consider your proposal.

**Foundation Grants to Individuals Online**, our searchable database of grantmakers to individuals, can help you identify potential funders. It is available by subscription or for free at our 400+ **Funding Information Network locations**.

Parts of a grant proposal

Your proposal should be a compelling presentation of your project, which includes reasonable objectives, a plan to achieve them, and your ability to carry out the plan. Your proposal should suggest that you are a potential partner in furthering the funder's mission, not just a person asking for money.

Click [here](#) if the funder has asked you to provide an artist's statement.

Proposals from Individuals usually do not exceed five single-spaced pages, in addition to the cover letter and the budget. Below is a typical breakdown:

- **Cover Letter**: Written specifically to the appropriate contact person at the foundation. 1 page.
- **Abstract** (also known as executive summary): Describes concisely the information that will follow. 250 words or fewer.
- **Introduction**: Helps to establish your credibility as a grant applicant. 1 sentence to 2 paragraphs.
- **Statement of Need**: Describes a problem and explains why you require a grant to address the issue. 1 page.
- **Objectives**: Refine your idea and tell exactly what you expect to accomplish in response to the need. 1 page.
- **Methods**: What you will do to accomplish your objectives within a stated time frame. 1 page.
- **Evaluation**: Measures your results and effectiveness. This should correspond to your objectives. 1 page.
- **Future Funding**: Details feasible plans to sustain your project. This applies only if the project will run indefinitely. 1 paragraph.
- **Budget**: Itemized list of income and expenses that shows precisely how much money you will need and how you will spend it to accomplish your objectives. 1 page.

To learn more about how to prepare each section listed above, and how to write proposals in general, check out the following training resources. Although the trainings were created for nonprofit organizations, much of the content can be applied to individual grantseekers:

- **Introduction to Proposal Writing**, available free as an online webinar or in-person class.
- **Proposal Writing**: Browse trainings, articles, videos, podcasts, and more on this topic.

See also "Document Checklist for Grant Proposals", a 3-part blog post series that covers the many types of documents often needed during this process.

Sample Proposals

...
<table>
<thead>
<tr>
<th>Name</th>
<th>GROSS RECEIPTS</th>
<th>ASSETS</th>
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<td>BILL &amp; MELINDA GATES FOUNDATION</td>
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<td>$47,850,406,255</td>
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<td>Bill &amp; Melinda Gates Foundation Trust</td>
<td>$144,217,336,649</td>
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<td>SHEPHERD'S GATE</td>
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<td>Golden Gate University</td>
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<td>Gates Family Foundation</td>
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<tr>
<td>Golden Gate National Parks Conservancy</td>
<td>$90,610,736</td>
<td>$116,411,940</td>
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Mission
Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives. In developing countries, it focuses on improving people’s health and giving them the chance to lift themselves out of hunger and extreme poverty. In the United States, it seeks to ensure that all people—especially those with the fewest resources—have access to the opportunities they need to succeed in school and life. Based in Seattle, Washington, the foundation is led by CEO Dr. Sue Desmond-Hellmann and Co-chair William H. Gates Sr., under the direction of Bill and Melinda Gates and Warren Buffett.
PROGRAMS + RESULTS

What we aim to solve

Add a problem overview to your profile.

Update now

Our programs
What are the organization's current programs, how do they measure success, and who do the programs serve?

SOURCE: Self-reported by organization

Global Health

Global Development

United States

Global Policy & Advocacy

Where we work

Our Results
How does this organization measure their results? It's a hard question but an important one. These quantitative program results are self-reported by the organization, illustrating their commitment to transparency, learning, and interest in helping the whole sector learn and grow.

SOURCE: Self-reported by organization

<table>
<thead>
<tr>
<th>Total dollar amount of grants awarded</th>
<th>Total number of grants awarded</th>
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<tr>
<td>TOTALS BY YEAR</td>
<td>TOTALS BY YEAR</td>
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<td>1,574</td>
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<tr>
<td>2015</td>
<td>1,669</td>
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POPULATION(S) SERVED
No target populations selected
How do I get foundation support?
Stakeholder identification is based on matching priorities

Match constituencies and expected outcomes
- e.g., undergrads / minorities
- e.g., STEM careers

Decide what to communicate
- Shared priorities
- Need/response/outcomes

Plan and execute tactics
- Phone call & proposal (always)
- Meeting or site visit (sometimes)
Effectively Engaging Foundation Staff

• If your job was to give away money, how would you want to engage with a potential grantee?

Tactics
• Respect their time (request a phone appointment, work with their scheduler)
• Develop relationship with the most senior person possible
• Position yourself/your organization as a resource
• Share news regularly (but don’t be a pest)
• Provide them with opportunities for visibility within your community
Keep it Simple

• Get your thoughts sorted out
  – Outline what you want to say
  – Make it concise - Avoid fluff
  – Avoid jargon
• Humanize your project
  – Tell a story
• Fill out the application form
• Answer questions clearly and honestly
• Revise and edit
• Get the proposal in ahead of the deadline—Really!

The Proposal Package

* Cover letter 1 – 2 pages
* Executive summary 1 page
Statement of need 2 pages
Project description 3 pages
* Budget 1 page
Organization information 1 page
Conclusion 2 paragraphs
Appendix

* First cut decision is usually based on these sections
Executive Summary

1. The ask
2. Need: how the funding will make a difference
3. Our response: project description, staffing, evaluation & outcomes
4. Organization and its expertise
5. Conclusion

The Ask, Need, and Response/Outcomes all flow from a well thought-out Logic Model or Success Equation
The Ask

“I’m at that awkward point in the proposal where I actually have to ask for money.”
Sample: Executive Summary

THE ASK

*The Great Hills Biological Station* requests from the *Ecolab Foundation* a grant of $25,000 to support the addition of an *Assistant Field Leader* to our *Summer Biological Field Studies Program* — or *Science Camp*, as it is known within the *Great Hills Community*. 
Sample: Executive Summary

ORGANIZATION EXPERTISE

Launched in 1986, Science Camp was among the first programs in the nation to engage youth from the community in gathering data about the region’s unique ecology that is used by researchers to guide regional conservation efforts. For example, knowledge gained by Summer Camp studies led to the State’s decision to protect the Great Hills Forest Natural Area, now a major tourist destination. In addition, many of our Summer Camp alumni have gone on to distinguished careers in biology.
Explaining The Need

Here is our new simplified logic model

Give us $  

We all WIN
Sample: Executive Summary

NEED

Summer Camp’s professional team urgently needs to break new ground by adding an Assistant Field Leader. This is because Summer Camp’s participants are increasingly diverse, coming from a mix of cultural and socioeconomic backgrounds. They now require more attention and leadership from staff to identify and address barriers to success—a situation that has severely stretched the capacity of Summer Camp’s biological professionals.
OUTCOMES

Adding an Assistant Field Leader to Summer Camp will solve these problems by:

• **Tutoring significantly more** participants to ensure a strong base of scientific and mathematical skills, based on their Summer Camp studies,

• **Tracking Summer Camp Alumni** through a year of follow-up mentoring,

• **Freeing the Summer Camp science team to ensure the excellence of the field learning experience**, thus enhancing future **career prospects for participants** and the **usefulness of the Summer Camp studies** to policy-makers.
CONCLUSION

The ultimate benefit of this initiative will be improved scientific literacy and critical thinking skills among Summer Camp’s increasingly diverse participants. This is an absolutely essential step in the process of helping today’s youth become tomorrow’s informed citizens, armed with an understanding of how science is conducted in the field, and how it relates to important societal challenges.
How much do we ask for?

Ecolab Foundation
Saint Paul, MN, United States | Who's Who | + Contact Info

Grants

MOST COMMON GRANT AMOUNT: $500

<table>
<thead>
<tr>
<th>Recipient</th>
<th>Recipient City</th>
<th>Recipient State</th>
<th>Recipient Country</th>
<th>Primary Subject</th>
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## Budget Tells a Story

### Personnel
- Project Director, Design, Lead Surveyor, Sample Preservation & ID | 40% | $24,000
- Project Manager, Logistics, data collection, intern training & survey | 90% | 45,000
- Data Collectors, 3 post-doc’s, data collection & ID. 25 hrs/wk x 12 wksx17/hr | | 15,300

Subtotal personnel |  | $84,300
Fringe benefits @ 28% full-time & 15% post doc’s |  | 21,615
Total Personnel |  | $105,915

### Other Expenses:
- Permit & visa facilitator for forest access, staff travel & sample export | | $4,000
- 12 indigenous camp staff @ 30 hrs/wk x 9 wks x $5/hr | | 16,000
- 3 field microscopes, 1 Nikon camera + kits for 3k samples in 3 forests | | 1,750
- Training materials for 3 post-doc’s & 12 camp staff | | 400

Total Other Expenses |  | $22,150
Total Direct Costs |  | $128,065
Indirect @ 20% |  | $25,613

**TOTAL PROJECT COSTS** |  | **$153,678**
Measuring Outcomes

• Evaluation includes both the specific grant and the overall program

• Financial and activity reporting for the specific grant

• Outcome reporting for the overall program

Hi, I donated $20 last year. Can you tell me exactly how many Children I've saved?
Other Style Notes

• Add a cover sheet including contacts.
• Add a table of contents & paginate.
• Appendices (optional):
  – Formal recognition of charitable status
  – Board list or project advisor list/project partnering institution list
  – List of current supporters
  – 1 page vitae, if appropriate
  – Letter listing key partners, if appropriate
And Finally – the Cover Letter

- Reference to conversation/past contact/past funding, if any
- Request
- Need
- Response – project description including outcomes
- Invitation for meeting or additional details
- Appreciation for review – looking forward to response
- Signature of senior person
With this letter and proposal,
The Great Hills Biological Station requests from the Ecolab Foundation a grant of $25,000 to support the addition of an Assistant Field Leader to our Summer Biological Field Studies Program — or Science Camp, as it is known within the Great Hills Community.

(Red language is cut and pasted from our Executive Summary)
What About Letters of Inquiry?

• Only if requested by the funder
• Request “consideration of a proposal for $XX to do ....”

Other examples:

• We would like to submit a proposal to the XYZ Foundation for $$$ in support of...
• I am writing to inquire about the suitability of submitting a full proposal to request a grant of $$$ to support...
• I am submitting the following as an initial inquiry for the ABC Foundation to consider a full proposal for...
Letter of Inquiry, continued

• A mini proposal summarizing the need, project, outcomes, our capacity
• Up to 2 – 2.25 pages, without a budget or appendices
• Offer to provide more information if needed
• Funding decisions are often made from of these
• Sometimes may be completed online
Takeaway: Cultivate the Donor(s)

- A system for building deep, life-long relationships with donors
- The process by which a potential donor is moved from cultivation to solicitation
- Each move builds on past moves, and leads to a subsequent action
- Build the relationship before you need to ask
- The best time to ask, and the amount to ask for, is donor-driven
Questions? Comments?
Contact Us

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Download the handout