



11-2012

Mining for Gold: Discover Foundation Funding

John J. Greenhoe

Western Michigan University, john.greenhoe@wmich.edu

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Greenhoe, John J., "Mining for Gold: Discover Foundation Funding" (2012). *Research and Dessert*. Paper 13.
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Mining for Gold
Discover Foundation Funding

John J. Greenhoe, MA, CFRE
John.greenhoe@wmich.edu
www.linkedin.com/in/johnngreenhoe
www.twitter.com/jjgcfre

It's a Big Funding World

- Beyond the Federal Agencies
- Diversifying Your Resources
- Layman's Terms

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Relationships Matter

- Federal Agencies, Foundations, Individual Benefactors
- It's All the Same ...
- Today's Focus – Foundations

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Today's Session

1. Foundation Trends and Strategies
2. Building Partnerships
3. First Steps
4. Today's Realities/Parting Shots

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Foundation Trends & Strategies

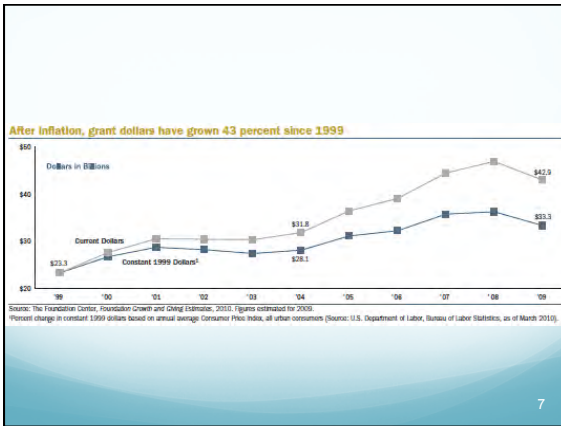
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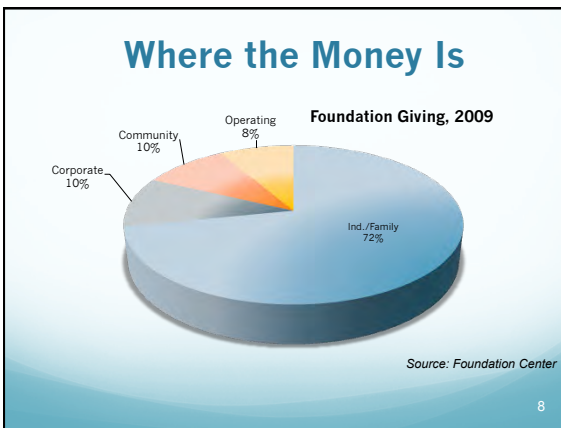
Foundation Growth

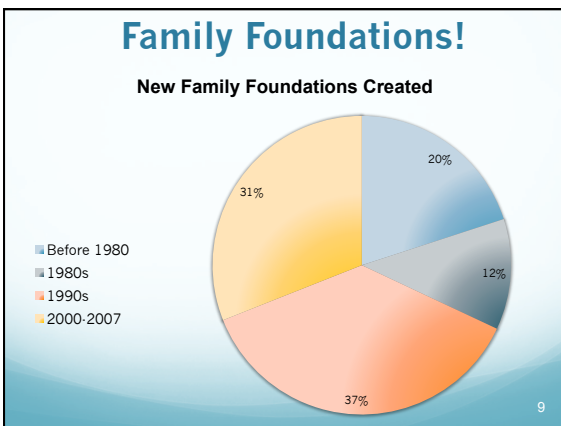
- Foundation Giving
 - 2004: Up 6.9%
 - 2005: Up 14.3%
 - 2006: Up 11.7%
 - 2007: Up 10%
 - 2008: Up 3%
 - 2009: Down 8.4%
 - 2010: Giving Flat
 - 2011: Modest Growth

Source: Foundation Center

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Longevity



- 2009 Foundation Center Study
- Most Family Foundations Plan to Operate Forever
 - Only 12 percent plan to close at some point
 - 63 percent plan on perpetuity

Community Foundations

- Don't Forget About Them
- Assets are Growing
- They "Know Where the Money is"
- Donor Advised Funds

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Do Your Homework

- Who Are You Dealing With?
- Large or Small Foundation?
 - Foundation Culture
- Operating Foundations, etc.

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How Do You Fit?

- In Back Yard, Don't Limit Yourself
- Regionally, Nationally – What is Your Fit?

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Building Partnerships

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Recognize Appropriately

- Use Internal Publications
- Highlight Media Coverage

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Creative Access

- More Than Just Leadership
- Legislative Connection
- Alumni/Constituent Connections

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Be the Gatekeeper

- Funneling System
- Many Foundations Like It
- Saves Time on Both Ends
- Insures Focus on Organizational Priorities



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Some Cautions

- For Mature Relationships
- Both Sides of the Fence
- Not for Everyone



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Understand Foundation Roles

- Program Officer's Role
- Give Them Ammunition
- They Look Good, You Look Good

First Steps

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Again, Do Your Homework

- Before the Approach
- GuideStar, Foundation Center, Web Sites, Board Members, etc.
- Does Your Organization/Program Line Up?

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The Approach

- The Phone Call
 - The Phone May Not Be an Option – That’s OK
- Brief and Focused
- Listen More, Talk Less



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The Journalist

- Think Like A Reporter
- Information Seeking, Not Soliciting
- Value Their Advice



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“Baseline” Questions

- Deadline/Deadlines for Proposals?
- Board Meetings – When/How Often?



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“Odds Assessment” Questions

- How Many Applications?
- What Percentage Do You Fund?
- Typical Grant Amount?



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“Open Ended” Questions

- Recent Initiatives?
- “Are there review criteria that might be helpful for our organization to know?”
- Unwritten Culture Cues



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The Approach (Cont' d)

- Funder Determines Next Step, But...
- Suggest Personal Meeting
 - If You Don't Get It, That's Fine

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The Approach (Cont' d)

- Email Approaches
- Personal Meeting Preferred, But
- Success Story

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Letter of Inquiry



- Can Be Initial Point of Contact
- No More than Two Pages

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Following Up

- The Phone Call
- Persistent, Not Pushy
- Whose Timetable?

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Other Thoughts

- Do Not Accept Proposals?
- Cutting Your Losses
- Thanks for Nothing?

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Today's Realities/ Parting Shots

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It's a New Foundation World

- Laser Focus on Foundation Mission
- Emphasize the Human Condition
- Show Impact on the Vulnerable/
Underserved

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Parting Shots

- Timing the Solicitation
- Determine Foundations' Fiscal Standing
- Use Available Tools

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Today's Session -- Recap

1. Foundation Trends and Strategies
2. Building Partnerships
3. First Steps
4. Today's Realities/Parting Shots

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In Conclusion...

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