

# Foundation-Funding-101

0:04

Thank you, everyone for joining us today.

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I'm really excited to have Donna Van Pelt here, who is the Executive Director of Foundation Relations, and she's going to be sharing with us more about her unit, what they do and how you can think about securing foundation funding for your research and the other work that you're doing.

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I just want to note that I'll be moderating the chat.

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So if you have any questions as he's speaking, feel free to add those to the chat and we'll make sure those get answered.

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And we are recording this session and we'll post it on our website within a week of the session.

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So I'm going to kick it over to Donna and let her run the show.

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OK.

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Thank you, Amanda.

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And I'm going to try to get my screen back up here.

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I may or may not be able to do.

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OK.

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There we go.

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All right.

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Thank you and thanks to everyone for being here and joining us for your lunch break.

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As we talk about foundation funding, I know that you probably have at least an interest, if not a little bit of information already about foundations.

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So I just want to tell you what to expect during this presentation so that if you don't see it, you can jog a quick note and we'll be sure to have you drop it in the chat and we'll get to it at the end.

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Also feel free to drop questions in the chat as I'm going.

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Amanda's going to help me monitor that.

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And as we can, we'll answer as many of those and then if not, we'll get to them at the end.

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So here we go.

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Some things that I plan to cover is just who we are, what's foundation relations and advancement basics about a foundation, how they're made, how they give money, what you can expect when you work with them.

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And a little comparing contrast to private foundations versus public foundations or public funding entities.

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And then most importantly the support and resources that you have available to you through foundation relations in addition to your research administration units.

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And then just some closing thoughts of things that over the years I've noticed that if we can do some of these little things, it just moves the bar a little bit and improves our relationships and potential funding with foundations.

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So I will jump in.

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As Amanda said, I'm Donna Van Pelt.

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I have been with the with Mizzou for less than a year now.

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So I am brand new here.

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I've been in higher Ed for about 25 years, most of that in a fundraising organization.

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Some of that has been with development communications and then CFR and then foundation relations.

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So I've started some foundation relation units in higher Ed and for a sociological institute.

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So this is near and dear to my heart and so I'm just glad to share whatever I can with you and hopefully we can work together in the future.

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So when I talk about a team, I will be very transparent with you and tell you that a lot of what I'm relying on right now is our university programs team.

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And so we'll be making some fundraising hires in foundation relations here probably over the next two to three months.

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But why the university program should matter to you is that that means that everyone on that team, which also includes corporate relations, it includes planned giving, we work across the university.

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So it doesn't matter what unit you're in, what department, college school.

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We are here to support everyone.

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I do hope that you know that you have advancement folks who are embedded in your school or college and they are great resources as well.

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Always happy to answer your question and they'll get you connected with the right people if they're not the folks to help you.

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What do foundation relations officers or advancement officers or fundraisers do?

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And in fundraising speak, we usually just say, well, we just manage the, we manage the funders and we manage the relationships with the funders, but behind the funders really their people.

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And so when you say manage, that's probably not exactly correct.

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I think a good way to think about it is we serve as the point of contact with funders on behalf of Mizzou.

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So some foundations really want one point of contact only.

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For others, it doesn't matter so much, but it really does help us to have a coordinated effort so that we know kind of the whole picture and no one is stumbling over or in front of or on top of each other.

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So we manage that piece and we're really focused on the relationship and getting getting contact with in conversations with foundations in addition to all the other things that we'll talk about that go into solicitation and into reporting on foundation funding.

5:04

And really our whole purpose here all of us as fundraisers is to secure investments and for me it's securing investments from private foundations and other funding organizations so that we can help support, strengthen, grow the research enterprise and all of our programmatic strengths and the priorities of the university.

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So I also want to clarify that when I talk about we and that being advancement and my colleagues in advancement, that also includes a lot of people around the university, but primarily it includes the research development offices and all the folks there.

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And we are working very collaboratively.

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The idea is not for foundation relations to replace what they do and it's not to duplicate what they do.

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So we're gonna work together, and the idea is that together we can support all the needs that faculty and staff have and maybe lift a little so that you can concentrate on the core of of making an ask and developing a proposal versus some of the administrative pieces that come with it.

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So before we get started, I just wanted to throw out a few bullets here because sometimes I get the comment of, well, you know, I don't really do foundation funding because it's not very big or it doesn't seem important or or whatever.

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And so I just wanted to share a few things with you.

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And the first is that nearly 20% of all philanthropy across all types of organizations actually comes from foundations and that's twice as much as corporations put towards philanthropy.

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And 20% may seem like a small part, but when you think about all philanthropy being, you know lots of people who may be out of church or school who are giving a few dollars.

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All of that big pot that counts 20% is a pretty nice chunk of that.

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But when you move into higher education it becomes even more significant.

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So the next bullet talks about grant stations survey last year and in that they found that 1.5 million was the median foundation grant to an educational association.

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Now when we talk about that, understand that very seldom are you going to approach a foundation and on the first time ask for \$1.5 million.

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But again that's where that relationship piece comes in that I'm gonna continue to talk about for the next 20-30 minutes here.

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That gets us to a point where we can be in a position to ask for money that is outside, maybe their norm, that ask for things that are outside of their normal program RFPs.

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And then finally at the bottom, the Council for Advancement in Support of Education also does an annual survey.

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And at the end of June last year was their most recent one, which was fiscal year 23.

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And in that it showed that organizations were now making up 65% of all of the charitable funds that are given to higher education.

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Now they look at small schools, large schools, public privates.

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But historically and until the past maybe 15 years, individuals in particular alumni have always carried the weight of funding, private funding to higher education.

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So this is really a big turn in a, in a different way of thinking about how we fundraise, excuse me, and its importance at higher in higher education.

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So if you look at that, that piece of pie, that red piece, you know it's it's outweighing that, that comes from individuals.

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It does include more than foundations.

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It includes corporations, it includes other kinds of organizations.

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But the good part is we're going to talk about those too and they're included in what we do here at Mizzou.

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And I also want to clarify that the \$36.5 billion that's given to higher Ed from organizations, what case is looking at is only charitable dollars.

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So those aren't things like field trials or you know anything that's done quid pro quo.

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It's not contractual, it's only philanthropic.

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They have very stringent deadline or guidelines about that.

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So those are all charitable dollars.

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So what is the foundation?

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Just in case you know you don't know.

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And we use that term a lot.

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And foundations.

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Other organizations can use the word foundation in their title of their name and maybe they don't use it.

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So it gets confusing sometimes.

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But foundation is always number one non governmental.

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It is also a non profit of some type 501C3 something or other five O1 C5 something like that.

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It is managed by a trustees or director, and that can be one person like a trust officer at a bank, or it can be 20 to 30 people who maybe make up a board of directors at a large foundation.

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They're always tax exempt in some way as well for private or independent foundations.

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They are charitable because they give their money away.

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So private foundations or independent foundations as I talk about them today, includes family foundations.

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Again, can be small, can be very large.

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A lot of the large foundations, such as Keck or Ford that you may have heard of, started out as family foundations.

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It also includes corporate foundations.

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Then we have public charities.

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Public charities like the Michael J.

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Fox Foundation have foundation in their title.

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But in fact are public charities really The only difference is, is that they are bringing money in as well as granting it.

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And some of that time, some of the time that funding can come from government sources as well.

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It includes corporate giving programs that perhaps are not pulled into a separate 501C3 corporate foundation.

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So it's just coming from the company membership in professional organizations, which sometimes we don't think about as potential funders.

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It's not their core business, but a lot of times you can get professional development dollars, travel dollars or they may partner with a larger organization to offer grants, commodities, so beef producers, egg producers, things like that.

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Those folks we often, I think, think about in terms of business because that's how they operate.

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But they are membership organizations, so they are nonprofits.

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And because they are membership organizations, most of them have some sort of process in which they delegate or assign or have input from their members about how they spend some of their dollars to do charitable work and then finally new emerging philanthropic LLCs.

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So these are things like Chan Zuckerberg has set up Zuckerberg, Chan Zuckerberg Initiative.

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We have Laura and John Arnold who have Arnold Ventures and LLCs still get, you know, they're tax exempt in certain ways and they get benefits from that.

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But what that means is they're not strictly giving grants.



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They're also they can make loans, they can make investments in startups.

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The biggest thing I think as a fundraiser about these is that because they're not private foundations, they don't file a 990, which is one of the tax documents, right.

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And so because they don't have to file that, we don't necessarily know exactly how they're spending their money.

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So they are much less transparent than some of the traditional foundations and it's a little bit harder sometimes to do research on them and find out exactly how they work and what they're giving their money to.

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So, but we are seeing more and more of those I would say every day as some of the younger generation especially decides that they want to handle their philanthropy in a different way.

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So this picture here is of Arnold and Mabel Beckman and there is the Beckman Foundation and I want to use them as an example just to talk about how foundations are made-up.

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So you may have heard of Beckman, Coulter and Arnold.

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Beckman was a scientist.

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He was an inventor.

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He created tools and instrumentation to help further science.

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He also was faculty member at Caltech.

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So Arnold and Mabel's decided to create this foundation when they were still living.

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And that started out pretty modestly.

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It was to give scholarships at Caltech.

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It grew over time and it now continues after their lifetime.

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The Beckman Foundation has about \$650 million in assets and they continue to get money, right.

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So they're getting it from stocks and securities and alternate investments.

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So the companies that they still hold stock in that belong to Arnold Beckman that he started, as well as the proceeds of sales that would have been in his estate.

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So they have many different ways that they are getting money.

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But the point being is that very often foundation funding will fluctuate and it fluctuates because a lot of times it's tied to the stock market, right.

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So you know, what they decide to do is, is really dependent on what's happening externally as well.

15:04

The other thing that I want to mention is that now that Arnold and Mabel have passed, obviously and they don't have children who are involved in their foundation.

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Why some foundations like the Keck Foundation still have board of directors who are descendants of the Keck's.

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Beckman has staff and larger foundations will have half staff.

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Sometimes they're very large staff of 50 or more.

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Beckman is a very lean program I would say and most foundations are pretty conscientious of not having a lot of staff.

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But in the staff you have program officers.

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And so while the board of directors or the trustees are really important because a lot of times they have the final approval on things, the program officers and program directors are really the gatekeepers.

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And those are the people that people in foundation relations like me work with most times on a daily basis.

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In some cases they're able to have some decisions, some to flexibility about how a program might roll out.

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If they make changes to a program, add a program, they can do that as a staff or as a team.

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But it all goes back to the mission and why that foundation was established in the 1st place.

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So even when foundations grow, they typically do not lose track of why and how they were created in the first place.

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OK.

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So that's the foundation and what does it do?

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So what does it fund?

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And I think that's probably a question that everybody wants to know what what, what are they going to fund and how can they help me.

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So to start off again back to that mission, a project that a foundation funds will always align with that funder and with their mission.

17:03

Now sometimes we can spin, if you will, or make the case for how your project fits into that mission.

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And that's something that we can help you do.

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But by and large, it has to be something that's in their realm of funding.

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They also fund research.

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Most of the foundations who give to higher Ed give to some type of research, anything from the humanities to, you know, the the bench science, or even to applied sciences.

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Again, always keeping that mission in mind.

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Foundations like to seed things, so they like to start new projects and new programs or expansions of existing programs they fund for impact.

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Foundations are trying to make an impact on society and on the world and make a philanthropic footprint.

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So one of the things that makes them a little bit different than maybe some of the public funders is, well, they're they want to know that you have the capacity to carry out your project.

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They don't get into the nitty gritty, maybe quite as much because they want to know more about the impact.

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Who's going to benefit?

18:15

How are you going to help them?

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What large challenge in the world are you trying to solve in your part of of the whole big picture, right?

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How are you contributing to challenges?

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And then finally IDE?

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And so foundations have always, I would say, been conscientious about inclusion and diversity and equity.

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But since 2020, there has been really a very focused effort to not only talk about being conscientious of IDE, but also to be very public about how they're going to carry out their programming, how they're gonna carry out their selection process so that they are ensuring that.

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And then sometimes it's easier to think about what folks don't find, right?

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So if we wanna include them or cross them off the list, sometimes it's just easier to look at, well, this is what they won't do.

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And I will say before I go through this list that there's always exceptions, but by and large, many of the foundations operate this way.

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Operations, So I mentioned earlier that foundations like to seed and start programs.

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They give to programs and projects.

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And so it is very rare that a foundation or organization like that would fund operations of an existing program, especially in higher education because they view higher Ed as already having a base of support.

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And I know being we can argue about you know, but this my program is different.

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But by and large we have a large institution that is in place And so getting any kind of operational dollars is typically not possible from a foundation.

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Indirect and administrative costs, foundations have improved on this in the last 10 years.

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So the difference is that they will usually set their own rates.

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Some of them will negotiate rates.

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Some of them will only pay indirect or overhead costs on research projects, but not an outreach or other projects or programming so that we can usually recoup some things.

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But what we won't get is we won't get the federal rate of F and A.

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So you know, an average is probably 8:00 to 12:00.

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I've seen as high as 22% from a foundation and that's about it.

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So that's really something to keep in mind as you're starting to develop your ideas and and your budgets.

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Staff positions are difficult to get from foundations.

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Again, it's not an absolute because I've gotten them before, but typically in order to get a staff position started, you have to have a plan in place that's also approved and you can demonstrate that so that when the grant period ends, that person doesn't lose his or her job and that person doesn't disappear from the project or the program.

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Now just to clarify, it is possible to get things like funding for a lab tech and we and obviously postdocs and students, but so to redirect someone's effort in higher Ed can happen with foundations.

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It's just starting.

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Those new positions, especially things that are more like administrative or support positions are really, really difficult to get.

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Foundations rarely give to endowments unless they have a special program set up to do that.

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We do have some typically that's for fellowships or scholarships where we see those endowments happening and they don't like to duplicate efforts.

22:05

And so this is both a A+ and A minus, right.

22:07

So they prefer to stay out of the same funding lane that the public funders are in.

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So when we have administration changes, so when we had a president that no longer was as concerned about the environment for example, and some of those dollars started to dwindle, the private foundations got together and they formed sort of an alliance or alliances.

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And if they aren't giving directly to environmental, climate, energy type things, many of them are asking about how your project impacts or what effect it might have on the environment.

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So again, they've just become more conscientious of that in recent years.

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OK.

22:56

And this is a big list and so I am not going to go over the entire list, but I do just want, I wanted you to have it.

23:02

So I wanted it to be in the slides and we'll look at just a few of these.

23:08

I will start with the first one.

23:11

And on the private side, it talks about programs and grant awards that are based on the founders and their mission and things like that, which I've talked about already.

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The decisions are made by the Board and to some extent program officers.

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So in larger foundations, program officers may have a budget and they are able to approve grants up to a certain amount.

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Some of them, everything has to go through and be approved by the board.

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When you're talking about family foundations, they may actually be the one who are who is reading your proposal and deciding whether or not to fund you.

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So it varies dramatically from foundation to foundation.

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On the public side, your programs are being determined and set up because of what's happening either to public funding.

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There are gaps.

24:07

Sometimes it's driven by politics, but there are certain types of programs where governmental has agreed to put some money toward that issue or challenge and those proposals go in and they are typically, you know, peer review scored and the comments become available to you.

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Those with the best scores end up getting the funding.

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Well the scores that are done if they are done in private funders.

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We don't necessarily see those and rarely is it possible to get the comments from those in the public realm.

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At least a lot of times you get that feedback and sometimes you can even resubmit right on the private side.

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It's very rare that someone can resubmit for the same project.

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I think I've had that happen twice in the last 15 years.

25:02

And again, smaller scale, close relationship with the foundation.

25:07

So that's something to keep in mind when you're developing proposals for foundations is you have to put your best foot forward.

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And I know we always intend to do that, but the likelihood of getting another shot with that funder for that project is, is really unlikely.



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The other thing to know is that when you when you look at trying to get a a program funded or a project funded on the public side, a lot of times you know, OK, I'm going to do this and then we have a chance for renewal.

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So that will give me my team a chance to have you know 6-7 years here of funding.

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When you go to a private funder very often it's sort of a one time thing.

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So it's project by project basis or we just don't know.

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So typically when foundations continue funding for a project, it's because they want you're gonna be expanding or doing something different like if it's outreach you're gonna you started in a few counties, now you're gonna go statewide or something like that.

26:13

But that involves a conversation with the program officers.

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And so again, relationship, relationship, relationship.

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On that.

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I'm gonna jump down to #3 on these.

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And that's just the solicitation itself.

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And again, one of the, the best slash worst things to remember about foundations is that not all foundations accept proposals from everyone.

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They can say they don't accept proposals at all and they handpick who they want to receive proposals from or just to designate their funding.

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So unlike a public agency that will post that RFP and they may have guidelines and eligibility that you have to fit in but it's it's more of an open process.

27:01

So that can be a frustrating thing about foundations and a little bit later I'll tell you what we do about that.

27:06

But when we can get in front of them, sometimes we can just share a conversation, a couple of paragraphs, a concept or white paper to gauge their interest before we do a full blown LOI and or proposal.

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And so that's a real benefit, right.

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So we know up front before we invest time in it.

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I think overall everyone would agree that foundation proposals are less complex than those that go to public funders and particularly federal funders.

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And so that gives you a little bit of of incentive I think to sometimes try things because you haven't invested quite as much time in the proposal process.

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The guidelines tend to be more general with a foundation which is again A+ and minus because one of the things we have to make sure is that we're meeting the expectation that they have.

28:02

So even though they may not spell every single thing out that they want to be included, there are expectations that you do include certain sections and you make a case for support and you pull into there in your introduction why they would want to fund it, like why us, Why now?

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Why you, the funder?

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And so those things don't often show up as bulleted in the guidelines.

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So those are things that foundation relations can help you with.

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I think the other piece is that when you write to a foundation, it's it needs to be tailored and foundation programs.

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So from program to program within one foundation, the guidelines can vary and the eligibility varies. And all of those kinds of things where when you go to public agencies you start to get sort of in a rhythm of certain agencies expect certain things and the attachments are the same and you may need to update them.

29:05

But at least we know these are the pieces that we have to have.

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Foundations can change on a whim.

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Or it may be that the, you know, program officer decides that this year they would like to know more about X.

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So we have to keep an eye on those things and always read the instructions and guidelines very closely, even if we've applied before.

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And then I'm going to skip down.

29:28

And on the private side, it's 5-6, but what we're what I'm talking about in those is essentially post award.

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So the proposals on the private side are a little more general.

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The reporting requirements also are a little bit more general and flexible, same with how you spend your money and the budgets in general.

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Everything around that tends to be a little looser.

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With foundations doesn't mean you don't have to tell them how you spend the money or, you know, follow a line item budget that you've presented.

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They absolutely can ask for expenditure reports.

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They can ask for results.

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The difference is that they're not telling you exactly how they want you to do it.

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And the expectations are not always that you will be successful because a lot of foundations are funding things that are high risk and they're seeding new ideas.

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So they're not necessarily looking for you to get from you know A to B to C without some sort of challenge and some, some turn in your project or program.

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And so that's sort of a, an expectation and something that we have a chance in, in doing the reporting to talk about with them.

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The other piece of that though is that while the reports are very important, just like they are on the public side, there's also an expectation that we will do what we call stewardship, which is just another layer of communication on top of the what is required.

31:05

So things start with saying thank you when you receive a grant from a foundation and we want to get to a point where you're saying thank you, Your Dean of Director is saying thank you.

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And if it's at a large enough amount, our President is saying thank you.

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That's really important to foundations.

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Other things we can do are send copies of publications that may be a result of your of your grant funding or an article that appears either, you know, in a Mizzou publication or maybe an external publication.

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News articles.

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We want to make sure that we're doing trying to get announcements about the gift and about the program in into the newspaper, local or otherwise and sharing those with them.

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And the reason this is important is because for them it validates and reaffirms their decision, right.

32:00

We made a good investment here in in the Pi or in the program and certainly in the university.

32:07

So that just helps to build that relationship and help carry us through to the end of your grant, which we will continue to do stewardship after that too because we all know things continue to happen even after the funding is is spent.

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OK, so lots and lots about that.

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So I know that a lot of people have asked me as I've come on board, can you get me a list of prospects?

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Can you, you know, are there prospects out there for me?

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How do I find them?

32:46

Will you find them?

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And the answer to all of those is yes.

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But what I would say is, first, because foundations give to projects and programs, you really want to know what you need the money for 1st.

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And so if you want to dig around, if someone on your team wants to dig around and look, there's some options here on campus for you.

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And the biggest one is Pivot, which is just a big database.

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It has both public and private opportunities in it.

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And you can, if you don't already have an account, you just go to the SPA website and there's a link there.

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You just have to put in some of your contact information and Mizzou has a license for that, so any faculty and staff person is eligible to log on there.

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On the SPA site you will also find limited submission opportunities and I would really encourage you to get in the habit of checking that periodically.

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That again has public and private, but a limited submission.

33:47

If you don't know is when the university can submit only a a certain number of proposals.

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Most often it's one, sometimes it's two or three, but most often it's one.

33:57

So we have to have an internal competition to decide which of those proposals goes forward.

34:03

I have added 35 to 40 foundation opportunities to that list of what is additional to what they had posted last year.

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So that list is expanding and that's a a resource for you as well.

34:17

There are periodic emails that come from Spa.

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Hannah will send some out and you know just set aside a little bit of time at the end of the day to to click in there and see what those are about because some of those are public charities as well as as other public funders.

34:36

And then the other thing that I would recommend is, you know, talk to your colleagues in your department, especially those who are perhaps have been here longer than you and, you know, kind of pick their brain a little bit.

34:49

Talk to those at other institutions, those who, if you're a faculty member, maybe you did grad work with who are in the same field as you.

34:57

Not that you would do the same project, but it just I think helps to get funding ideas from other people.

35:03

Sometimes people have been successful with a funder that maybe doesn't automatically as we do research, come off as a as someone who would fund your projects and they can offer some advice there so you can dig around in there, you can come to foundation relations.

35:20

And again, what I'm just gonna ask you is a little bit about your project, how much money you think you would need and then how that money would be applied.

35:29

So we would want to know if it's for faculty, if it's for, you know, mostly for students, how are you going to use it?

35:36

We have some databases that we subscribe to that aren't available to everyone, and they're, you know, they're limited.

35:42

So I can't, I can't share them widely.

35:44

But we have a foundation directory online.

35:47

We have inside philanthropy, we have a research team that will help us who has other tools and databases where we can look.

35:55

I'd also say that we have a customer relation management system and we have you know put notes in about foundations that we have talked with over the years.

36:06

So a lot of times when we have those personal conversations, those one on ones we're getting information that's just not out there on the web, right.

36:14

It's it's explained better, it's explained differently.

36:20

Sometimes we we should get to a point if we're not already where you know those who have been funded by a a foundation sometimes can get opportunities that are not out there and open to everybody and that's again part of that relationship piece.

36:37

And so we want to get to that point, but we have those written down and recorded.

36:41

And so we can look up those kinds of things for you too, regardless of whether we're looking, you're looking or a combination because you can bring a list to me and I can help you kind of pare it down too.

36:54

That works really well.

36:56

But we have to funnel from the broad topics to much more specific.

37:01

So if you think about cancer, what kind of cancer?

37:04

And then what are you doing?

37:05

Are you doing research?

37:06

Are you doing patient care?

37:09

Pay attention to the eligibility guidelines, both for you as an individual if it's a research project, but also for the institution.

37:19

There are foundations that will only give to five O 1C threes.

37:23

The university is not a 5O1C3, but if you come across that or if you're not sure how to interpret that guideline, let me know.

37:31

We do have ways of applying for A5O1C3 through advancement, so we can help you with that.

37:38

Look at geographic location and one of the things that I will do sometimes it's it's limited and you know we only we only fund in California.

37:48

That's easy to sort out.

37:49



Other times they will say they will fund other places, but then we look at their grant history and we find out you really don't like you really don't.

37:58

And so that would fall lower on our list, right?

38:00

Not as likely to to give a grant to Mizzou.

38:06

And everything that we're looking at, remember we're always coming back to the mission and the purpose of that foundation and how does that project fit in there.

38:16

And then finally, I would just say that before you contact a foundation or if you want to found contact a foundation but you don't know them or you don't know how, let me or someone else in advance.

38:27

But know part of that is like don't be afraid to do that because it's very rare that I would say no, you can't because X is happening.

38:36

Typically what that means is great because that will only help strengthen our relationship.

38:42

I may want to invite myself to sit in, but if we do that, I guarantee you that I'm one who's sitting there taking notes, maybe clarifying things at the end because you know you all are the content experts and it's not in that situation.

38:59

That's not my job to try to talk about your project.

39:03

So please let us know before doing that.

39:05

At the very least we'll make a note as I was telling someone else not very long ago, a couple weeks ago, it's like they're like I didn't know.

39:12

I had to tell you and I'm like, well, you didn't.

39:14

But also know that if I don't know about your project, then if someone else comes to me today, I'm going to be go for it.

39:21

And so you would be competing perhaps against each other.

39:26

And so we may want to talk about timing and things like that.

39:29

So it's always good to know that full picture and have a coordinated effort on behalf of the university.

39:37

And now we're to one of the slides where I said I wanted to spend a lot of time and we don't have a ton of time.

39:41

But so this is really the funding cycle, if you will and every spot on the funding cycle there is support for you.

39:53

So whatever you need between me and the rest of my, you know, university programs team and your research development teams there, we can help you with them.

40:05

So all you have to do is come forward, raise your hand, let us know.

40:09

We talked already about the prospect research and discovery.

40:13

I would say in addition to just looking for funders, we're also keeping track of a group of funders.

40:18

There is a list of 20, not 20, probably around 200 right now where?

40:26

I'm not necessarily working with all of them because I'm one person, but we are trying to keep track of changes in their programs, keep up to date on their deadlines, those kinds of things.

40:37

So that's what we call our portfolio.

40:43

Then we move into the strategy and cultivation.

40:45

That's that process of making sure that your project is a fit.

40:49

It's also thinking about how we approach them.

40:52

So maybe you're a chemist, but we're going to go to American Heart.

40:56

So there is there are opportunities for you there.

40:59

We just have to make that case as to how and why they should fund your project.

41:06

Strategy also comes in when we're talking about larger initiatives on campus.

41:11

We're identifying funders and then kind of setting up do we do corporate, do we do foundation first, do we do individuals and how does that that work?

41:20

So kind of a whole funding strategy for the project.

41:26

We're doing that cultivation.

41:27

You know, it's my desire that the first time a foundation hears from us is not when we want to ask for money.

41:34

Sometimes that's difficult.

41:35

They're just not open to conversations unless you do have a project to put in front of them.

41:40

But you know, I want to do my best because we do want them to know us.

41:44

People give to people they know, and so when they know us or know of us, that is helpful.

41:50

So that's part of that cultivation process that will get you down to solicitation, which may look like a letter of inquiry, It may look like a proposal.

41:59

A lot of times it's both.

42:02

I would also throw in there again that sometimes it's just a paragraph or two.

42:06

So I do have foundations that I meet with regularly just to give them updates on what's happening.

42:12

So if I know about what you're doing and I have a little blurb about it, sometimes I can just kind of test the waters with it.

42:20

So that's always helpful and feel free to to send those my way.

42:26

So when you get to letters of inquiry and proposals between my team and the team in the research development office, we will help you.

42:35

Research development will always take the budget and help with that because they have access to things that you and I don't have.

42:44

So they are wonderful partners in that respect.

42:47

But even if it's only proofreading or making sure that you know your intro is OK, so there's there's a gamut and it can be personalized.

42:57

Doesn't mean I'm gonna write the whole thing for you.

43:00

Doesn't mean I'll write any of it.

43:01

It's really based on your personal needs.

43:04

The other thing that we can help with is getting letters.

43:08

Sometimes we have to have a letter from the Provost or the president, you know, let us run that and

you don't have to worry about those kinds of things, attachments, reformatting, all of those kinds of things that that take time away from really talking about your research or your program or project.

43:25

And that's where when we get into the proposal process, I really want you to be able to spend your time.

43:32

And then I mentioned this earlier, but stewardship and reporting reporting's important, but the stewardship goes hand in hand with the reporting.

43:41

So again, every college and school I know is, is different.

43:46

The research offices are staffed differently and have different capacities.

43:50

So we're not trying to replace anything, but I would like to be sure that folks have the same amount of support for their reporting needs as they do for their proposal needs.

44:00

So know that that is that is coming and we'll be able to to ensure most of that.

44:07

And I would also say that a lot of my relationships with Foundations have really blossomed when it gets to the reporting point because there are lots of opportunities to talk about updates and changes and things like that.

44:21

So those are really good entries into bolstering that relationship with foundations.

44:28

And then it kind of brings us back to the top.

44:31

And I just want to reiterate that foundations and funding organizations on the private side just operate a little bit differently.

44:38

So it's great if we can all work together because then we can share the knowledge from from both sides to I think input and improve on foundation proposals.

44:49

All right.

44:50

And then just to wrap up, I don't need to go through all of these, but you know if you look at it again some of the things that I've mentioned make sure your project is a fit, spend time on LO is and internal competitions spend time at the beginning, don't poo poo something just because it's not a full proposal because with foundations that's a really good way to get entry point.

45:14

And also I would say that with with foundations, sometimes those just send a paragraph to the program officer.

45:23

Those are actually opportunities that can bring in larger dollars than some of the normal programming RFPs.

45:30

So tell me about that.

45:33

Talk to us before you talk to a funder and then I'll just close with show gratitude and say thank you.

45:41

That's super important and it only takes a second to do that.

45:44

So that is it and I think we will.

45:47

I think it looks like we have some questions.

45:49

Amanda, I don't see any questions in the chat yet, just folks asking for some resources.

45:55

But does anyone have any questions for Donna?

46:00

I had a question if that's all right, Go ahead.

46:04

Absolutely.

46:06

Hi.

46:07

So my question was about, I think sometimes I have the assumption that foundation funding is really best suited for like science and kind of textile innovation funding.

46:21

So I was wondering if you could speak about the possibilities in like creative works and whether that's something that foundations also consider 'cause I we operate sometimes under these misconceptions.

46:31

So if that is 1, tell me it is it is.

46:37

I would say, you know, like my earlier slide, the majority of money from foundations goes into research type activities in higher education.

46:47

But that doesn't necessarily mean that there are fewer gifts and grants made to the arts and to the humanities.

46:55

They just kind of tend to be a different amount and you know, for all kinds of reasons.

46:59

But yeah, there, there are funders out there for all kinds of creative endeavors, everything from writing books to artwork to all of that.

47:10

So if that is something that you are interested in, you know, we can talk about it or you, I would encourage you to take a look and see what's out there.

47:20

And again, those keywords are really important as you're doing searches in those databases, but I'm happy to help you with that as well.

47:27

Thank you so much.

47:28

Thanks.

47:29

You're welcome.

47:30

Donna, there's a question in the chat of whether you have a subscription or ability to search Grant stations.

47:38

I do not have a subscription to that right now.

47:42

I've used Grant Station in the past.

47:45

There's some cheater ways around Grant Station to get a couple of weeks.

47:50

If I'm looking for a specific project, sometimes I will, I will do that.

47:56

It's probably something that we need to talk about going into the the fiscal year whether or not it's it's not super expensive.

48:06

I just, I feel like a lot of it is duplicative of what I already have in foundation directory and a couple other resources that I have is why I don't have it picked up.

48:21

OK.

48:21

Any other questions for Donna?

48:25

I guess, Donna, I have a question.

48:28

If someone is here today and they've heard what you're talking about and they're like, I have an idea, I'm trying to find funding and they reach out to you, what does that process look like?

48:39

What is that initial meeting gonna look like with you and what should they be ready with for that meeting?

48:46

Yeah.

48:46

So it's really helpful if actually I have one this week and one next week that refers from you.

48:54

And they just sent a little blurb about what they're thinking about.

48:58

And then we're gonna meet on a zoom call and and that point, I'm gonna ask some little more



probing questions about how much money we're talking about and how that money's gonna be applied.

49:10

And then we'll just kind of see what comes up.

49:14

It really varies.

49:15

Some people have, you know, come to me and it's like, oh, I put this LOI forward and it didn't get funded.

49:20

Can you help me?

49:22

And we can work with that too.

49:26

And then it can also be the opposite end of the spectrum where it's much more broad.

49:30

And I've come and I've talked to like a research group and it's like here are some of the things going on and we can do that.

49:37

What we just have to know is that you're gonna come up with a big list, right?

49:42

The more general your project is, the bigger, you know, you're gonna be at the top of the funnel.

49:46

Excuse me.

49:47

And so I think those gives you give you will give you some ideas and then as those projects start start to take shape then that's when we really hone in on special the specific funders And sometimes that means based on timing, sometimes it's how much money they'll give, all those kinds of things.

50:05

So, yeah, just send me an e-mail.

50:10

Thank you for sharing that.

50:11

And I'm glad to hear some of our referrals have have gone to you.

50:14

So any other questions for Donna while we've got her here today?

50:21

OK.

50:22

Well, I put her contact information in the chat.

50:25

Donna, thank you so much for sharing your wealth of knowledge with us.

50:28

This was fantastic and we really appreciate learning from you today.

50:34

Thank you.

50:34

I am.

50:35

I'm happy to be here.

50:36

As soon as things come up, just let me know.

50:38

I love working with faculty and the research development offices have been great too.

50:45

So great partnerships here at Mizzou.

50:47

So thanks.

50:48

Thank you.