How To Strategically Pursue Private Foundation Funding

UCF Grants Day
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Andrea Wesser
UCF Office of Research & Commercialization
Why Pursue Private Foundation Funding?

• Can be sizable amounts for basic, applied research or infrastructure/resources for a variety of markets or institutions

• Ideal for understanding your research’s end users and path to implementation

• Often does not require matching funds

• Requires components of the proposal that are familiar to NSF based “broader impacts/intellectual merit” vs. full commercialization plans

• Non-dilutive for commercialization

• Provide an avenue to addressing major crises/challenges the world faces
Private Foundations by Market

**HEALTH/WELLNESS**
- Health Grants Info Center
- Health Resources in Action
- Coalition for Health Communication

**EDUCATION/ARTS & HISTORY**
- Kresge Foundation
- Institute of International Education
- Pearson Higher Ed’s List
- American Academy of Arts & Sciences

**CLEANTECH/ENVIRONMENT**
- Terra Viva Grants
- Energy Foundation
- Skipso
How Private Foundation Funding Works

• Can fund basic research but more importantly, target the implementation of the research into the world

• May not necessarily target third world/impoverished geographies or communities under crises

• Due dates and funding pools are often not guaranteed compared to other funding sources

• PIs are not necessarily from universities/national labs

• Often can be awarded to individual researchers similar to CAREER awards or to recognize individuals
Getting to Know the Foundations

Get out there and attend opportunities to network with private foundations at the following conferences/trade organizations:

- **Council on Foundations** – lists events all around the world
- **Foundation Source** – another large list of conferences
- **South East Council of Foundations** – very pertinent regional networking
- **Private Foundation National Conference**
- **Exponent Philanthropy Events** – help you network with institutions who have successful won private foundation funding
- Vice versa - be accessible: create your website to communicate clearly what you are working on
Typical Private Foundation Proposal Components

• Title Page and Table of Contents

• Executive Summary

• Narrative
  - Statement of Need
  - Project Description (Goals/Objectives; Methods; Staffing/Partnerships/Collaboration; Evaluation; Sustainability of Efforts)
  - Organization Info
  - Conclusion

• Budget

• Appendices and Supporting Materials
## The Weight of the Executive Summary

<table>
<thead>
<tr>
<th>Purpose of Section</th>
<th>Review Criteria</th>
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<tbody>
<tr>
<td>- A summary of the entire proposal that introduces the funder to the program.</td>
<td>- Is the executive summary compelling?</td>
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<tr>
<td>- Describes the:</td>
<td>- Does it give you a clear understanding of the project?</td>
</tr>
<tr>
<td>- Need</td>
<td>- Do you want to learn more?</td>
</tr>
<tr>
<td>- Project</td>
<td>- Does it make a strong impression?</td>
</tr>
<tr>
<td>- Funding Requirements</td>
<td>- Does it make the project and organization memorable?</td>
</tr>
<tr>
<td>- Organization and its expertise</td>
<td>- Does it highlight specific outcomes of the program?</td>
</tr>
<tr>
<td>- (Sometimes) used for foundation board of trustees review</td>
<td>- Does it specify the request?</td>
</tr>
<tr>
<td>- Written LAST in order to capture a snap shot of the entire proposal</td>
<td>- Does it specify a &quot;purpose for the request?&quot;</td>
</tr>
<tr>
<td>- Inspires the reader to want to learn more</td>
<td></td>
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<tr>
<td>- Complete enough document to stand on its own</td>
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Source: Foundation Center
Winning Tips for Private Foundation Funding

• Keep language clear and simple
• Keep it compelling and with energy/commitment
• Instill trust to carry out work
• What will demonstrate success?
• Have a well-thought out plan
• Talk about how this plan is mutually beneficial
• Show shared goals and values with the funder
• Avoid jargon/acronyms
• Follow guidelines strictly
• Make the proposal attractive – use clean formatting and white space
Red Flags on Proposals for Private Foundations

• Funders are always worried about the risk of funding new organizations - **highlight** the expertise and credentials of the PI

• Do not include pictures/graphics in proposal

• Scope of project doesn’t reflect amount being asked for

• Proposal must be logical – do not cut and paste

• Pay attention to who you are addressing in the proposal and make sure you are addressing the correct program manager/recipient

• Clearly state outcomes of work

• Staffing and organizational capacity must be clear and sufficient to support the work.
Helpful Resources

• Foundation Center Tools/Templates available from UCF Research Development Office

• GrantSpace!

• Health Grants Info Center

• Wells Fargo Private Foundation Grants Listing

• Guidestar’s Nonprofit Information Center

• Open Education Database’s 100+ Places to Find Funding For Your Research

• USDA’s Guide to Funding
Where to Start

• Connect with Maddy and utilize all the UCF Research Development resources/search accounts available to you

• Work through sample proposals UCFRD has on file

• If you need implementation partners, please reach out to the UCF Venture Accelerator or Colleges of Education, Health and Public Affairs or Medicine for their connections

• Ask UCFRD for referrals to faculty/staff who already have relationships with these foundations or who have won funding from these foundations
Contact Information

Madhavi (Maddy) Chokshi
Research Development – Private Foundations

mchokshi@ucf.edu  407-882-1141

Proposal Funding and Assistance
http://www.research.ucf.edu/funding_assistance.html

Andrea Wesser
UCF Office of Research and Commercialization

Andrea.wesser@ucf.edu  407-882-0594

Venture Accelerator
www.venturelab.ucf.edu