Can we sing a **LOVE** song: working with philanthropic trusts and foundations

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Can’t Buy Me Love

Why do you want to partner with a philanthropic trust or foundation?

• Philanthropic funding in New Zealand, giving by philanthropic trusts and foundations accounted for 42% of all giving in 2014 – almost $1.2 billion.

• Two types in NZ:
  1. Voluntary (charitable, family and individual)
  2. Statutory (community trusts, energy trusts, licensing trusts, gaming machine societies and the Lottery Grants Board)

• The type you apply for is important & will affect what is required for your application and ongoing relationship.
Here, There and Everywhere

Where to find your perfect match

- Check the staff intranet research pages
- Talk to your Development Manager
- Talk to your networks (and beyond)
- Google!
Something

Finding the right match for your project

• What is the type of trust and who are the decision makers?
• What is their vision, purpose, strategy and funding priorities?
  What are their underlying beliefs and guiding principles?
• What is their preferred problem-solving approach?
  What is their political ideology?
• When is their closing date for funding?
• How much will they fund?
• Stalk their ex’s – look at successful past applicants, often listed in annual report or ‘success story’.

DON’T FORGET TO LOOK IN THE MIRROR!
What does your digital footprint say about you?
I Want To Hold Your Hand

**Formal application**

*Most will have a template for you to use. If not, speak with your Development Manager*

1. Speak their love language. **Align with their priorities & reference them continuously.**
2. Who are you courting. **Who will be reviewing your application, from what POV and with what information?**
3. Who is the villain in your story? **What is the challenge, problem or issue you are working to overcome? Don’t spend too long on this (if the need is genuine it will show).**
4. Paint a picture of your life together. **Impact, impact, impact. How will you make the world a better place with their help i.e., why should they care about your project? Think big!**
5. **THEN** go back and show them how you’ll make the magic happen. **What is the proposed project and why are you the best person to undertake this. Why you and why now?**
6. Dot your i with a love heart. **Make sure you fulfil all the technical requirements i.e., budget, timelines etc.**
7. Sing a duet, not a solo. **Include them in the proposal – how will you work together? Can you include their stakeholders or other groups they work with? Attribute potential impact to then: ’Your support will enable XXX’**
8. Go back to impact. **Have you answered, ’so what?’**
The Long and Winding Road

What happens if you get declined

• It’s not you, it’s us - a decline could simply be down to limited funds within the Foundation for that particular funding round
• If you want feedback, do be polite about it (could go through your Development Manager):
  • “Is there anything we could have done to make this application more likely to be funded?”
  • “Can you tell me if there was anything lacking in our application?”
  • “Would it be worth our while applying for this project again in the next round?”
• Can you repurpose the application for a similar Foundation or donor?
P.S. I Love You

Long-term relationship v a fling

• Talk with your Development Manager about what might be appropriate in your particular circumstance.
• P’s & Q’s – send a thank you letter to the Trustees immediately. In this, ask how they would like to be recognised and reported to. Would a letter from the Dean or Vice-Chancellor be appropriate?
• Formal requirements (milestone reporting, meetings, impact reports)
• Additional opportunities (media mentions, informal updates, end user testimonials, public lectures, ‘$ can’t buy experiences’, meeting with trustees/their donors.
• Development office also have a range of recognition opportunities (listing in annual report, e-news pieces, media releases, induction into the Chancellor’s Circle).

FAILURE TO DO THIS WILL RISK YOUR FUTURE RELATIONSHIP
All we need is love

In summary:

K eep your eye on their values, priorities and vision

I nvestigate what the Foundation is looking for (& who is doing the looking)

S how impact – what working together will achieve & how it fits their vision

S how the love – remember to take your Foundation along on the journey and thank them, thank them, thank them!