Finding your True Love Match: philanthropic trusts and foundations

1. Check the staff intranet research pages for upcoming application deadlines

2. Try these NZ websites:
   New Zealand Charity Register
   https://www.register.charities.govt.nz/CharitiesRegister/Search
   And this link for advanced search by category or for trustees
   https://www.register.charities.govt.nz/AdvancedSearch
   NB search on an individual’s name gives you all the foundations they are or have been trustee for – for current list of trustees, search by the foundation name

Trust and Foundation giving: 2014 survey and explains types of foundations in NZ
http://philanthropy.org.nz/trust-and-foundation-giving/

Generosity NZ – givUS service ($)  
Formerly ‘Fundview’ – directory of funders
https://generosity.org.nz/giv-us

Strategic Grants ($)  
Provide their GEMS subscription grant services to NZ NFPs
https://www.strategicgrants.co.nz/

Philanthropy NZ website has a list of its grantmaker members (no information on them)

3. Speak with your Development Manager
4. Google!

For more information, please contact:
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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, listed in annual report or ‘success stories’.

**Formal application**

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?’*

**What happens if you get declined**

- A decline could simply be down to limited funds within the Foundation for that 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?

**Stewardship**

- Talk with your Development Manager about what might be appropriate in your particular circumstance.
- Send a thank you letter to the Trustees immediately. In this, ask how they would like to be recognised and reported to.
- 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).

**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 will working together 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!