



Medical Society Fundraising Network

Working with Foundations

Winter 2011



Goal for Today:

Working Effectively with Foundations

Outline

- Background and Trends in Foundation Sector
- A Little about JAHF
- Working with Foundations
- Questions and Some Answers



Background

- 75,000 Grantmaking Foundations
- \$42.9 Billion in Giving 2009
- \$30.8 Billion from Independents vs. Corporate (\$4.4B) or Community (\$4.1B)



Background

- 32,000 hold \geq \$1,000,000 or payout \geq \$100,000
- 64% of these are $<$ 20 years old
- Assets Concentrated : 80-20 rule



Background

- Health and Education Are Top Areas
- Dwarfed by Individual Charitable Giving (\$229B, ~\$22B to health organizations)



General Trends

- Increasing Prominence
- New Approaches
- Increased Scrutiny/Criticism



The Philanthropist - NBC Site - Windows Internet Explorer

http://www.nbc.com/the-philanthropist/

google philanthropy stumbles

the philanthropist television show

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The Philanthropist - NBC Site

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THE PHILANTHROPIST

NEXT ON
Watch the Full Season of The Philanthropist NOW!

MAIN ABOUT VIDEO EPISODE GUIDE PHOTOS EXCLUSIVES COMMUNITY GAMES SHOP

03 Episodic Photos
Your adventure with the Maidstone-Rist clan is just a click away. Click through the photos from Season 1.

WATCH THE LATEST

HAITI
While Teddy and Philip attempt to help solve the food shortage in Haiti, Philip confronts his estranged

Ready To Look Years Younger?
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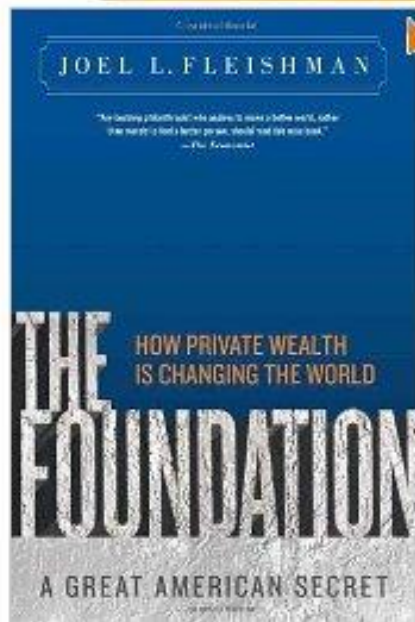
Best matches for the philanthropist television show
www.Lifesty WHO D
Chat about The Philanthropist and other new NBC shows here. [Jump to text](#)

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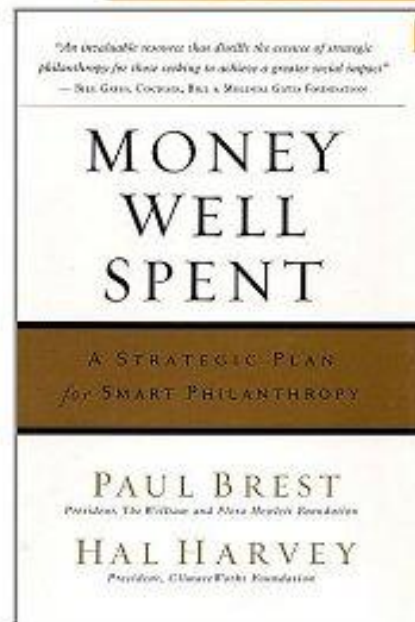


More Seriously

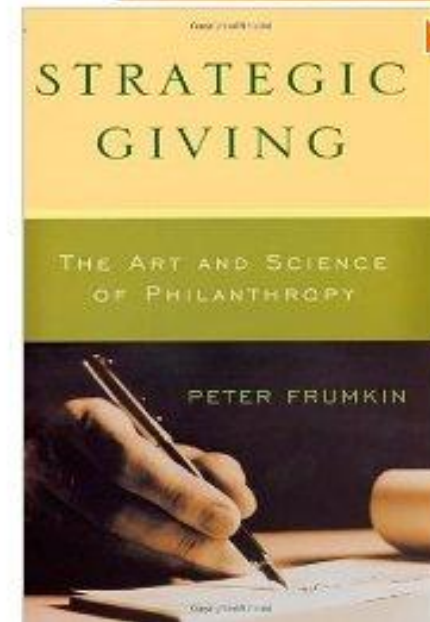
Click to **LOOK INSIDE!**



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General Trends

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- New Approaches
- Increased Scrutiny/Criticism



Everyone Gets in on the Act

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HALF A DOZ

SOCIAL ENTREPRENEUR:
Shannon McNamara started a nonprofit to promote literacy after a family trip to Africa.

PHILANTHRO-TEENS

Kids raise the bar on giving with Facebook fundraisers, even their own foundations

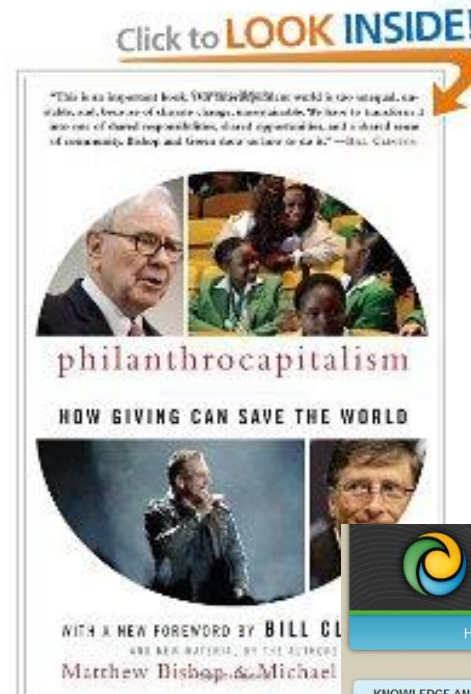
BY MIRIAM KREININ SOUCCAR

Basking Ridge, N.J. But the experience was "worth more than any cruise or trip to Disneyland could give you," she said.

When Shannon McNamara was 13, her parents took The family took a similar trip to Africa three

New Approaches

- Venture Philanthropy
- Tactical Philanthropy
- Capacity Building
- General Support
- Spend Down
- Social Investment
- Social Entrepreneurship
- Social Enterprise





**Google's Philanthropy
Branch Google.org Shifts
Focus To Technical
Engineering**

January 29, 2011
**Google Finds It Hard
to Reinvent
Philanthropy**

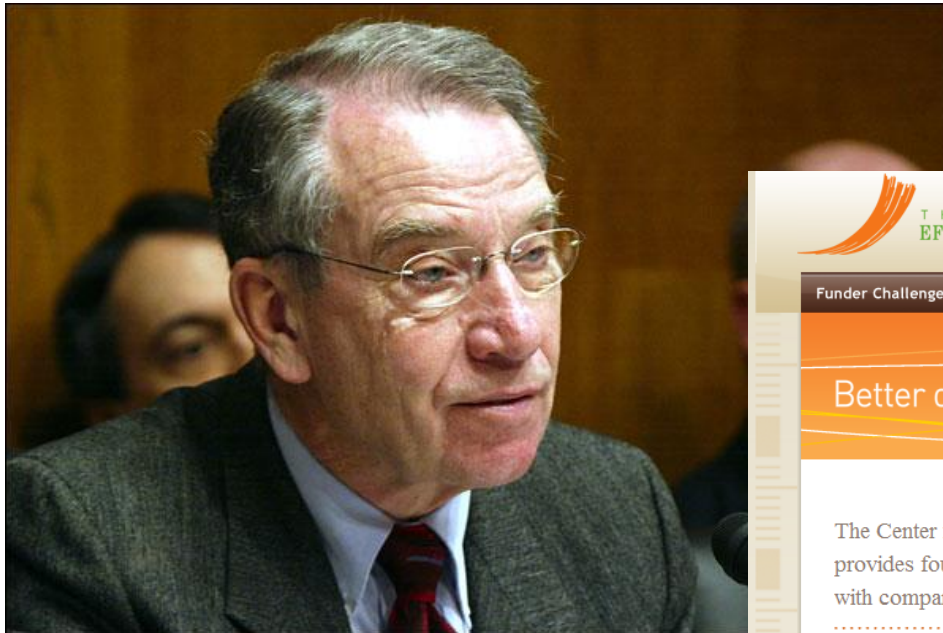


General Trends

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Everybody's a Critic



THE CENTER FOR EFFECTIVE PHILANTHROPY

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Better data Better decisions Better philanthropy

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The Center for Effective Philanthropy (CEP) provides foundations and other philanthropic funders with comparative data to enable higher performance.

Through our research, assessment tools, and programming and communications, CEP's data and insight helps funders achieve the most positive outcomes on issues, fields, communities and people. CEP's work spans the toughest challenges facing leaders of grantmaking institutions:

- **Assessing Performance:**
How are we doing? How do we know?
- **Developing Strategy:**
Is our strategy clear, coherent, and well-implemented?
- **Optimizing Governance:**
Is our board engaged and effective?
- **Funder-Grantee Relationships:**
Are we working productively with our grantees?
- **Managing Operations:**

What's New

- **Register Now for CEP's 2011 Conference**
Sign up now to learn from innovative thought leaders and visionary peers.
- **New CEP Research (.pdf)**
Grantees Report Back: Helpful Reporting and Evaluation Processes
- **CEP is Hiring**
CEP is looking for a **director of communications**, an experienced **research manager/associate**, and a **research analyst** to be based in Cambridge.

Content Library

- **Organizational Changes at CEP**
February 4, 2011
Phil Buchanan opens the search for a director of communications and applauds the many accomplishments of current vice president—programming, communications, and development



Financial Trends

- Effects of the Crash
 - Giving reduced 2009 and 2010, but only to 2006/2007 levels
 - Intergenerational Wealth Transfer, slowed but still \$6-\$25T (e.g., Margaret A. Cargill Foundation)



Financial Trends

- Fundamental Issues
 - Sustainability
 - Partnerships
 - Role of “Social Capital”

John A. Hartford Foundation
Webinar – June 2010

Go Big! with Your Donor Relations to Build Future Sustainability



Dena Baldwin &
Karen LaPolice Cummins

Fundraising “Booster” Webinar, June 2010: Donor Engagement

Session Overview



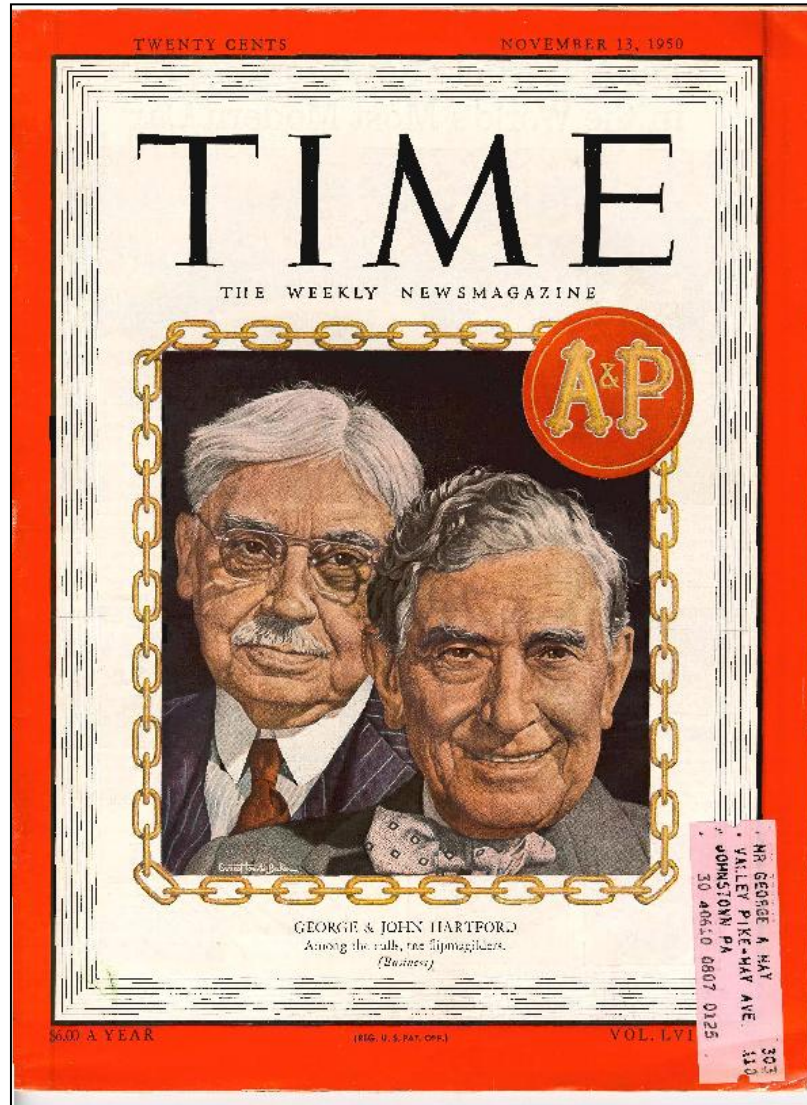
- Identifying Donor Prospects
- Team Approach/Collaborative Asks
- Segmenting priority donors
- Cultivation/Stewardship
- Making the “Ask”



**“To know one foundation is to know
one foundation”**









Hartford Foundation: Mission

Improve the health and well being of older Americans through better education of health professionals and better designed health care delivery.





Hartford Foundation: Rationale

- In 2011, those born in 1946 will begin to turn 65
- By 2030, 71 million Americans will be 65 or over, double the number in 2005



Hartford Foundation: Rationale

Older Americans are the Core
Business of Health Care

~43% of hospital bed/days

~35-70% of outpatient visits

~70% home health cases

~85% of hospice cases

~90% of nursing home occupancy



Hartford Foundation: Rationale

Older Americans Get Poor Care

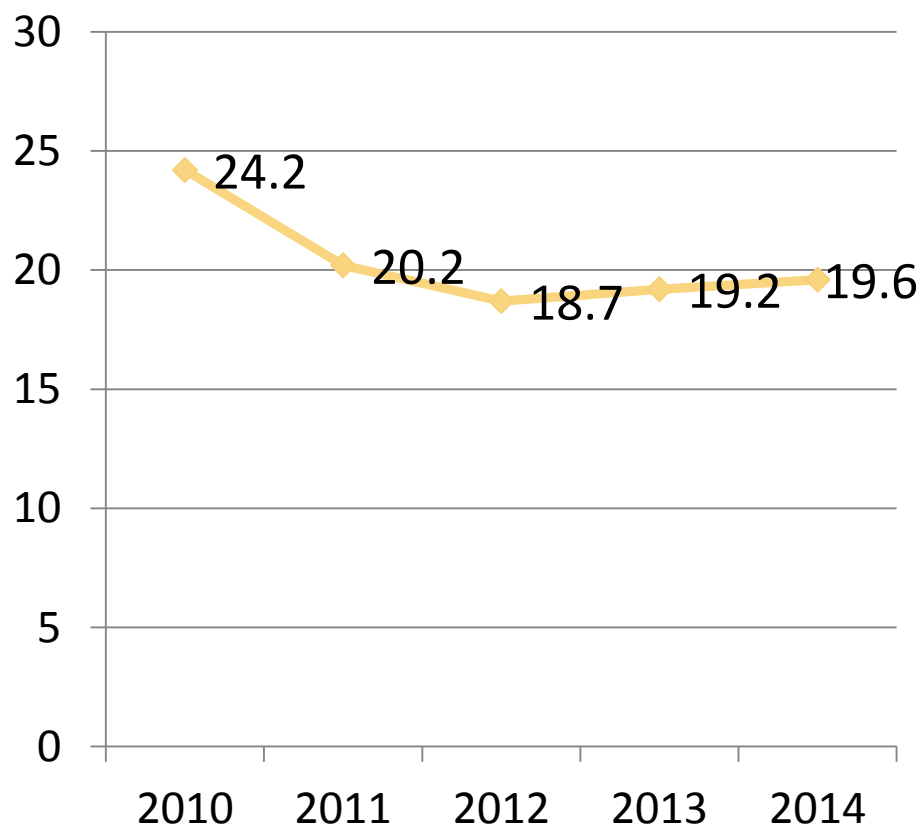
- 30% of indicated care provided for “geriatric conditions” (vs. 55% more generally)
- 60% of unnecessary hospitalizations
- 19% of hospitalizations of OAs lead preventable harm (vs. 13% <65)



Grantmaking Approach

- Only national funder focused on aging and health mission
- Highly strategy driven
- Expert staff, engaged in the field
- Creating change, not grants alone

Projected Payout (\$ millions)

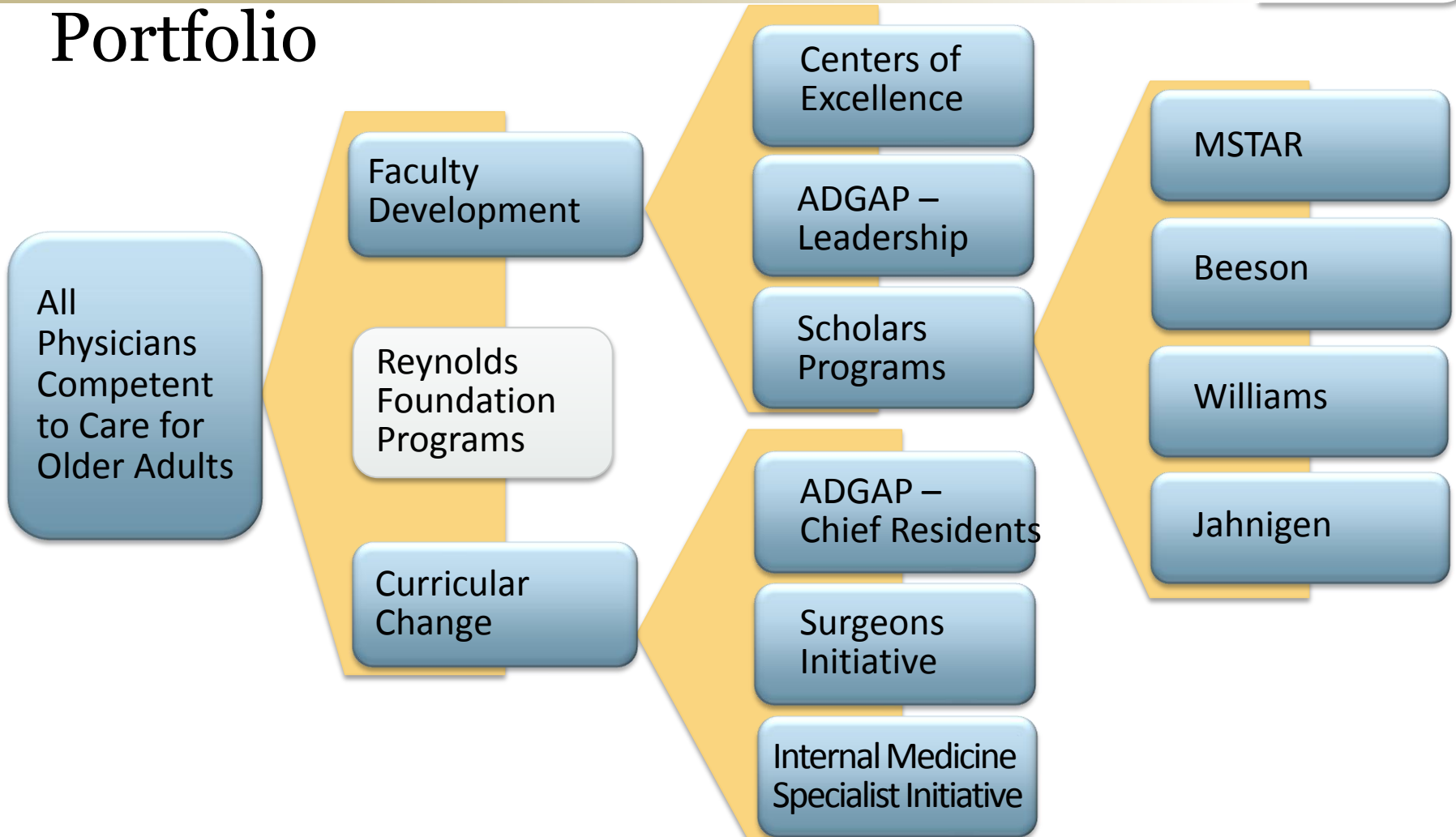


Aging and Health Program: Overview



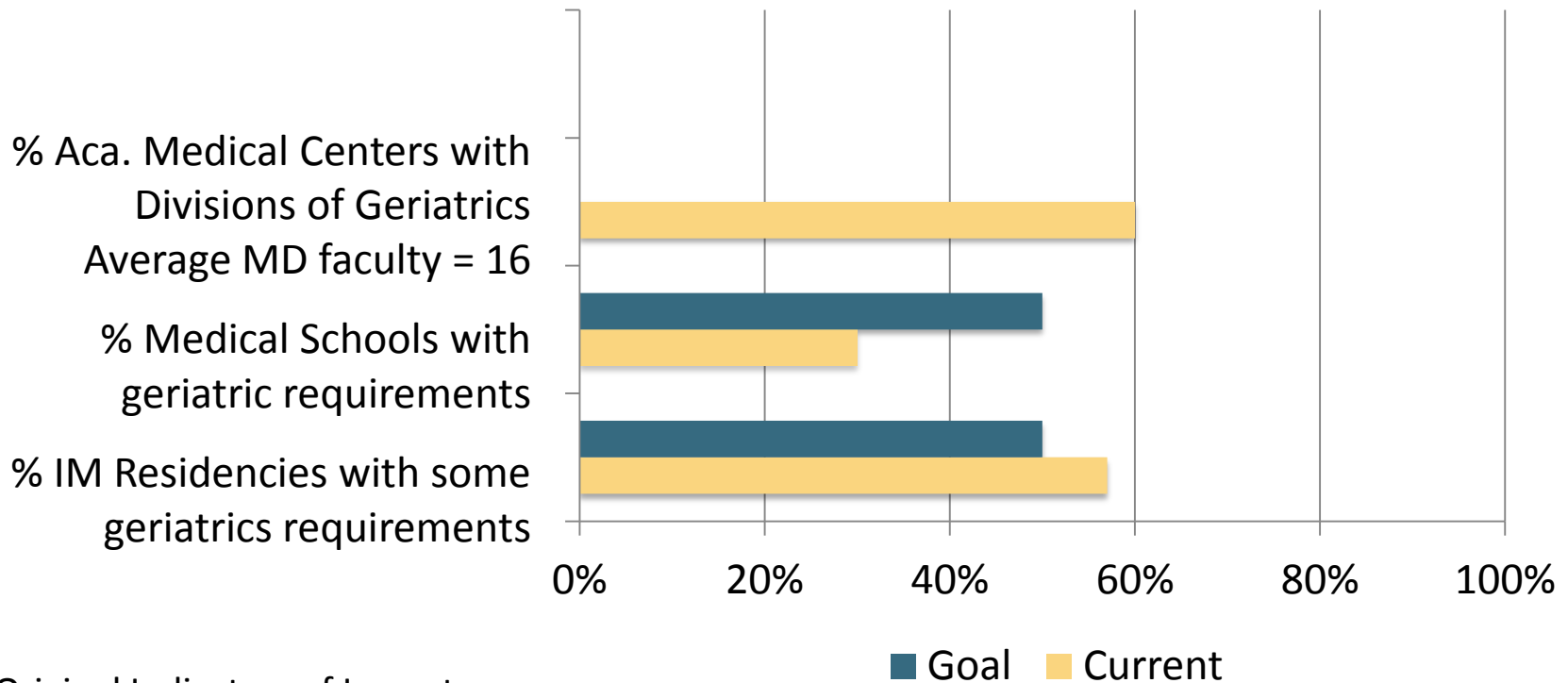


Medicine: Portfolio





Medicine: Indicators of Impact*



*Original Indicators of Impact:

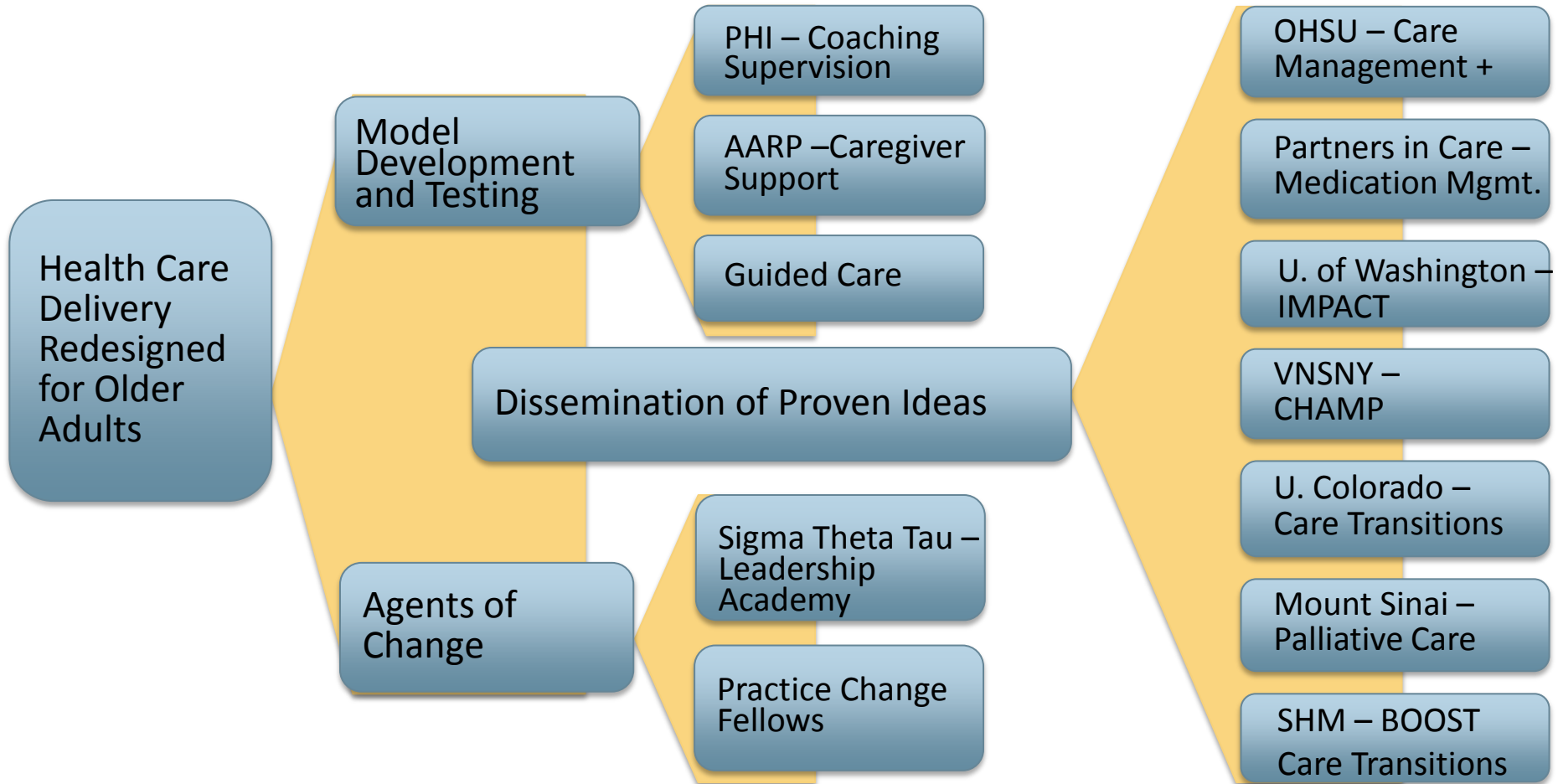
Faculty in Divisions of Geriatric Medicine Grow by 20%

Medical Schools Adopting AAMC Geriatric Competencies

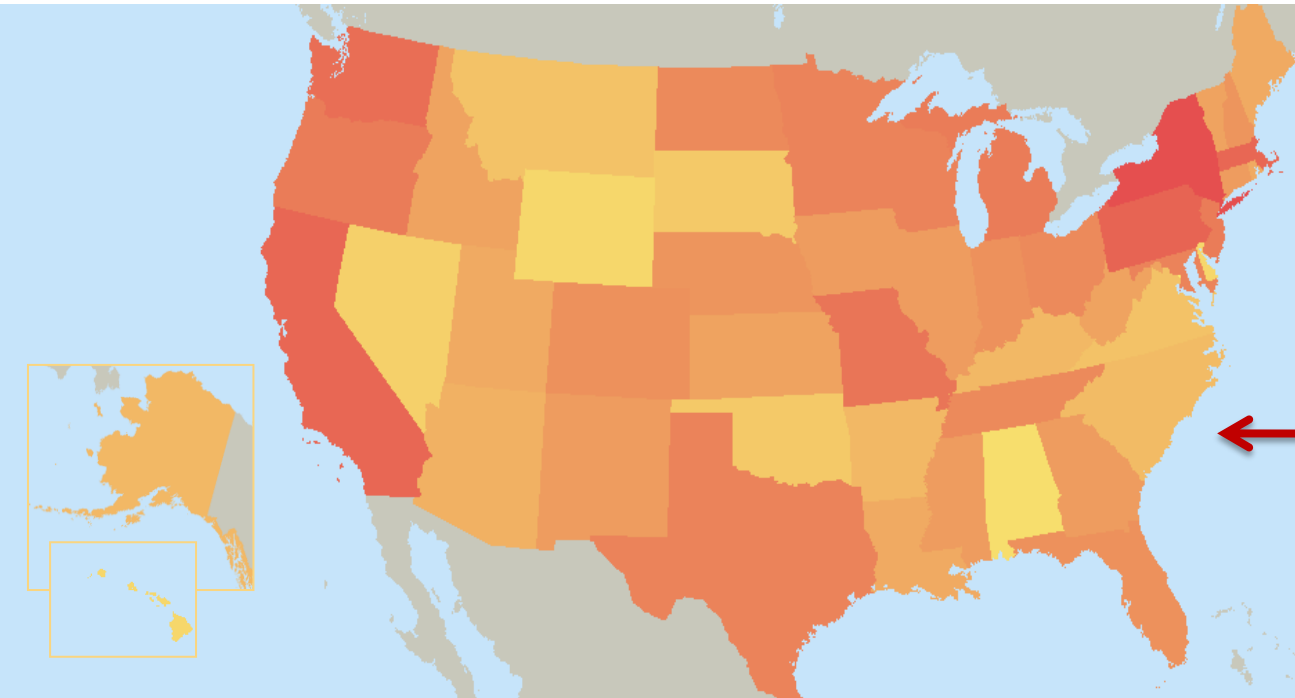
Residencies, Specialties, & Subspecialties Adopting Geriatric Training Standards



Integrating & Improving Services: Portfolio



Integrating & Improving Services: Grant Outputs



- Models Adopted in 50 States
- 3,764 Clinical Sites
- 5,372 Providers Trained





Working with Foundations







Foundation Activities

- Manage existing grant programs
- Find and develop new programs
- Create networks
- Broker resources & knowledge
- Communicate
- Convene stakeholders
- Partner with other foundations







The Dos and Don'ts of Grant Seeking

1. Learn about a foundation's mission, goals, and objectives
2. Learn about the foundation's culture
3. Understand the internal processes of grantmaking
4. Understand the foundation perspective
5. Know when to bring in content/project experts
6. Don't be dismissive or condescending of foundation staff
7. Know when and how to revise a proposal
8. Cast net widely for funds



DEDICATED TO IMPROVING HEALTH CARE FOR OLDER AMERICANS

The John A. Hartford Foundation

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GRANTS

The John A. Hartford Foundation's overall goal is to increase the nation's capacity to provide effective and affordable care to its rapidly increasing elderly population. In order to maximize the Foundation's impact on the health and the well-being of the nation's elders, grants are made in two priority areas:

Academic Geriatrics and Training

The Foundation supports efforts, on an invitational basis, in selected academic medical centers and other appropriate institutions to strengthen the geriatric training of America's physicians, nurses, and social workers.

Integrating and Improving Health-Related Services

The Foundation supports a limited number of sustainable efforts to improve and integrate the "system" of services needed by elders and the effectiveness of selected components of care. The emphasis is on nationally replicable models and is typically by invitation.

The Foundation normally makes grants to organizations in the United States which have tax-exempt status under Section 501(c)(3) of the Internal Revenue Code (and are not private foundations within the meaning of section 107(c)(1) of the code), and to state colleges and universities. The Foundation does not make grants to individuals.

Due to its narrow funding focus, the Foundation makes grants primarily by invitation. After familiarizing yourself with the Foundation's program areas and guidelines, if you feel that your project falls within this focus, you may submit a brief letter of inquiry (1-2 pages) which summarizes the purpose and activities of the grant, the qualifications of the applicant and institution, and an estimated cost and time frame for the project. The letter will be reviewed initially by members of the Foundation's staff and possibly by outside reviewers. Those submitting proposals will be notified of the results of this review in approximately six weeks and may be asked to supply additional information.

Please do not send correspondence by fax or e-mail.

Mail may be sent to:

The John A. Hartford Foundation



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Over 92,000 U.S. foundations and corporate donors, 1.3 million recent grants, and more than 400,000 key decision makers.

—Vice President, Development, Atlanta

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NYRAG

New York Regional Association of Grantmakers

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Grantseekers

NYRAG is a membership association of more than 280 grantmaking organizations. We serve our members through professional education programs, networking opportunities, and collaborative funding initiatives.

Although NYRAG was formed to serve grantmaking organizations, we provide additional resources and services to grantseekers as part of our commitment to strengthening the nonprofit sector. However, please note that **NYRAG does not make grants**.

To research funding opportunities, and obtain fundraising or organizational assistance for your nonprofit, explore the resources and recommended sites below.

In This Area

- NYNJ Area Common Application**
Common grant application form developed to facilitate the application process for grantmakers and grantseekers. Includes sample cover sheet, suggested application format, and list of funders who accept the common application.
- NYNJ Area Common Report**
Common grant report form developed to facilitate the reporting process for grantmakers and grantseekers. Includes sample cover sheet, suggested application format, and list of funders who accept the common application.

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- Join NYRAG
- Search Member Directory
- Find a Job
- Get a Grant
- Reserve Conference Room

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Take our short online survey

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Questions & Discussion