

Life After AoA Funding

Presented by

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THE ASSOCIATED

Jewish Community Federation of Baltimore

Life After AoA Funding

- Grantmaking in Today's Economy
- Donor Research and Cultivation
- Sustainability Tips
- Making Your Case with a Strong Proposal

Grantmaking in Today's Economy

FOUNDATIONS REPORT 28% MEDIAN DECLINE IN ASSETS

Chronicle of Philanthropy Survey of LARGE Foundations

PLANS FOR 2009 GRANTMAKING

- 53% will contribute less
- 30% will keep grant making flat
- 16% plan to increase grant making

Philanthropy in a Turbulent Economy

January 2008 Study of Individual Donors

- 52% plan to donate at 2008 levels
- 17.5% plan to donate less
- 40% willing to give new gifts to organizations helping those hurt by recession

Are Donors/Foundation 'Refocusing'?

Historical Trends

New Reality

- Basic Needs
- Operating Support

Foundation Center has tracked more than \$160,000,000 in new commitments in response to the current economic crisis

Understanding Donors

2008 Study of High Net-Worth Philanthropy

(Sponsored by Bank of America, Researched and Written by The Center on Philanthropy at Indiana University)

- Sound business practices and “appropriate” administrative costs listed as top two expectations of charities
- Desire to “give back” to local community was the motivation for giving most frequently cited
- Direct correlation between volunteering and financial support
- Top reason donors stopped giving to a particular charity – no longer feeling connected to the organization

Donor Research and Cultivation

- Compile
- Investigate
- Contact and Cultivate

Compile

- Websites
- Foundation Center Library
- Networking

Investigate

- Does the foundation/donor support similar things?
- Does the foundation clearly state that it provides support for the type of project for which you are seeking funds?
- Does the foundation make grants in the same geographic area where you or your programs are?
- Does the foundation make grants in the monetary range that your are proposing?

Contact and Cultivate

- Learn about the process for applying.
- Identify contact person and call.
- Set up meeting, if possible.

Sustainability Tips

- Plan ahead
- If reasonable, make BASIC NEEDS case
- Tie in to funders' interests
- Use DATA!
- Emphasize FEDERAL funds
- Maximize partnerships

Helpful Websites

WWW.CENSUS.GOV

- 2000 Data
- 2010 and 2030 Projections

WWW.AARP.ORG

- Research on Wide Variety of Topics
- Links to Aging Trends and Statistics

WWW.VNSNY.ORG/ADVANTAGE

- Reports and Fact Sheets on Findings of 2003 National Survey of Adults 65 and Older

Making Your Case with a Strong Proposal

- Project Summary
- Agency Overview
- Needs Statement
- Program Description

Project Summary

- Describe need/problem/issue.
- Brief description of program.
- Describe anticipated results.
- State amount of request.
- Concise and compelling.
- Write after you complete the proposal.

Agency Overview

- Describe the mission of your organization.
- Describe constituents.
- Establish credibility.
- Lead into Needs Statement.

Needs Statement

- Why is this program necessary?
- Relates to the goals of your organization.
- Supported with data.

Program Description

- Goals and Objectives
- Methods
- Evaluation
- Future Plans
- Budget

Goals and Objectives

- Goals are lofty; objectives are measurable.
- The outcomes of the activities.
- The “ends” not the “means.”

Methods

- Shows how you expect to accomplish the objectives.
- Flows naturally from objectives.
- Describes sequence of activities.
- Describes staffing of activities.
- Are reasonable given time frame resources.

Evaluation

- In light of your objectives. ...
- What kind of evaluation?
- Who will conduct it?
- How?
- How will it be reported?

Future Plans for Support

- Reasonable expectations.
- Comprehensive strategies from varied sources.
- Increased support from sponsoring organization.

Budget

- Use form if possible.
- Be specific.
- Be honest.
- Budget should reflect narrative.
- Be balanced.

Follow-up

- If funding is denied, try and learn why.
- Be timely with reporting requirements.
- Keep in touch throughout the year.

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