

# How to Make Your Case for Support to Corporations and Foundations

September 12, 2024

# Meet the CFR Team



**Terah Archie**

Interim Director  
Corporate and Foundation Relations

phone: 252-838-1820  
fax: 252-328-4904  
email: [archiet15@ecu.edu](mailto:archiet15@ecu.edu)



**Katy Johnson**

Assistant Director  
Corporate and Foundation Relations

phone: 252-744-1146  
fax: 252-328-4904  
email: [johnsonkaty23@ecu.edu](mailto:johnsonkaty23@ecu.edu)

# Who Gives the Gifts?

Giving USA 2022: The Annual Report on Philanthropy

G

Giving  
USA™

A public service initiative  
of The Giving Institute

**\$557.16 billion**

In 2023, Americans gave \$557.16 billion to charity, growing 1.9% over 2022.  
However, when adjusted for inflation, total giving declined by 2.1%.

# Where did the generosity come from?

## Contributions by source

By percentage of the total

**67%** \$374.40 billion

### Giving by Individuals

↑ grew by 1.6% from 2022

**19%** \$103.53 billion

### Giving by Foundations

↑ increased 1.7% over 2022

**8%** \$42.68 billion

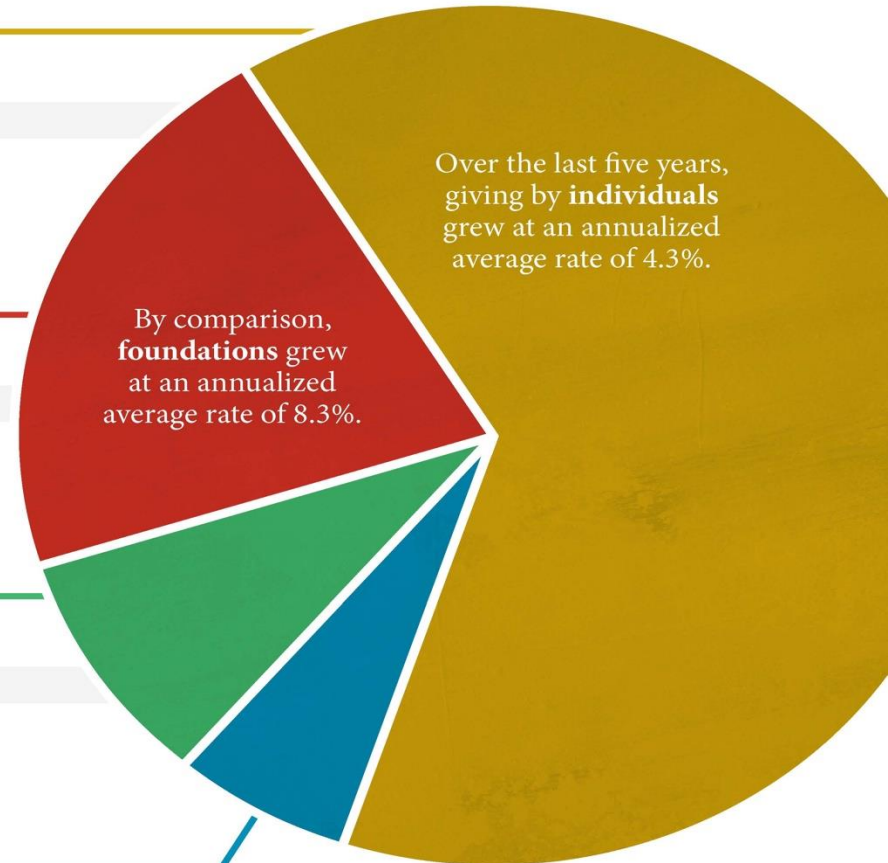
### Giving by Bequest

↑ increased 4.8% over 2022

**7%** \$36.55 billion

### Giving by Corporations

↑ increased 3.0% over 2022

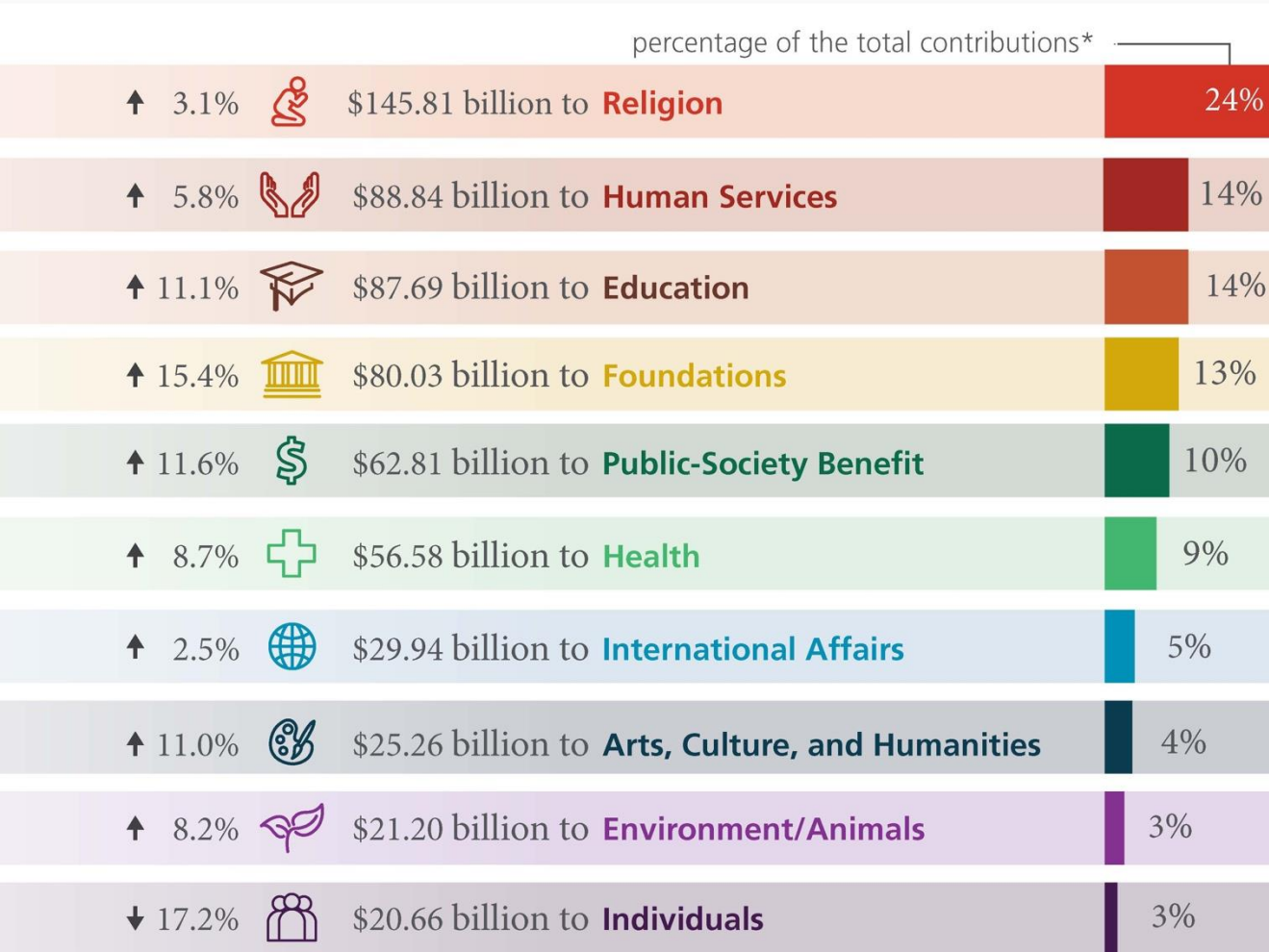


\*All figures on this infographic are reported in current dollars unless otherwise noted. Inflation was slightly higher than average in 2023, at 4.1%, and results may differ when adjusted for inflation. Learn more in the chapters.



# Where did the charitable dollars go?

## Contributions by destination



change in comparison to total raised in 2022

\*Percentages for recipient categories are calculated using the sum of recipients, which can differ from total giving for any given year. This difference is called unallocated giving, and totaled -\$61.66 billion in 2023.

Donor-advised funds are among the fastest growing forms of giving. Learn more about where grants from DAFs go in the chapter on donor-advised funds.



Five of nine subsectors reached their all time high in 2023, even when adjusted for inflation: human services; education; health; arts, culture, and humanities; and environment/animals.

# The Role of CFR at ECU

- ❖ Find the fit
- ❖ Facilitate gifts/grants from funders that **only** give to 501(c)3 organizations - ECU Foundation, ECU Health Foundation, Pirate Club
- ❖ Speak the language of the funder
- ❖ University's **primary point of contact** with private foundations and corporations



# CFR as Primary Point of Contact

- ❖ Help them navigate campus
- ❖ Build trust and transparency
- ❖ Show appreciation for business budget cycles
- ❖ Function at the speed of business
- ❖ Coordinate fundraising efforts

❖ Stewardship



# CFR Development Process & Services

- ❖ Project concept form
- ❖ Research and identification of potential funders
- ❖ Pre-proposal consultations with funders
- ❖ Proposal development, review & editing
- ❖ Face-to-face visits with funders/ site visits to campus
- ❖ Cover letters & support letters (Chancellor, Provost, Deans)
- ❖ Post-award coordination of submissions and reports
- ❖ Coordinate Media Coverage & Stewardship



# Why Do Corporations Give?

- ❖ Civic participation. Giving restricted to places they operate.
- ❖ Enlightened self interest. They need an educated workforce.
- ❖ Individual leadership initiative. The CEO or senior leaders often shape giving priorities.

# Why Do Corporations Give? Cont.

- ❖ Quid pro quo. What's in it for us and our shareholders?
- ❖ Good corporate citizenship. Positive community image in places they operate.
- ❖ Endowment is a hard sell for corporations.

# Why Do Foundations Give?

- ❖ To honor the donor
- ❖ To make the world a better place
- ❖ To meet community needs
- ❖ Because they have to . . . IRS 5% rule

# Who is Most Likely to Give Us a Grant?

- ❖ Local and regional corporations and foundations whose interests are aligned with campus priorities
- ❖ Corporate headquarters near campus, or much of their workforce/sales are in our area
- ❖ Major corporations and foundations that fund nationally and at which ECU has alumni and other contacts in C-suite; must also be mission-aligned
- ❖ Corporations that participate in on-campus recruitment for full-time employment and internships
- ❖ Corporations interested in workforce development programs for their local and regional employees

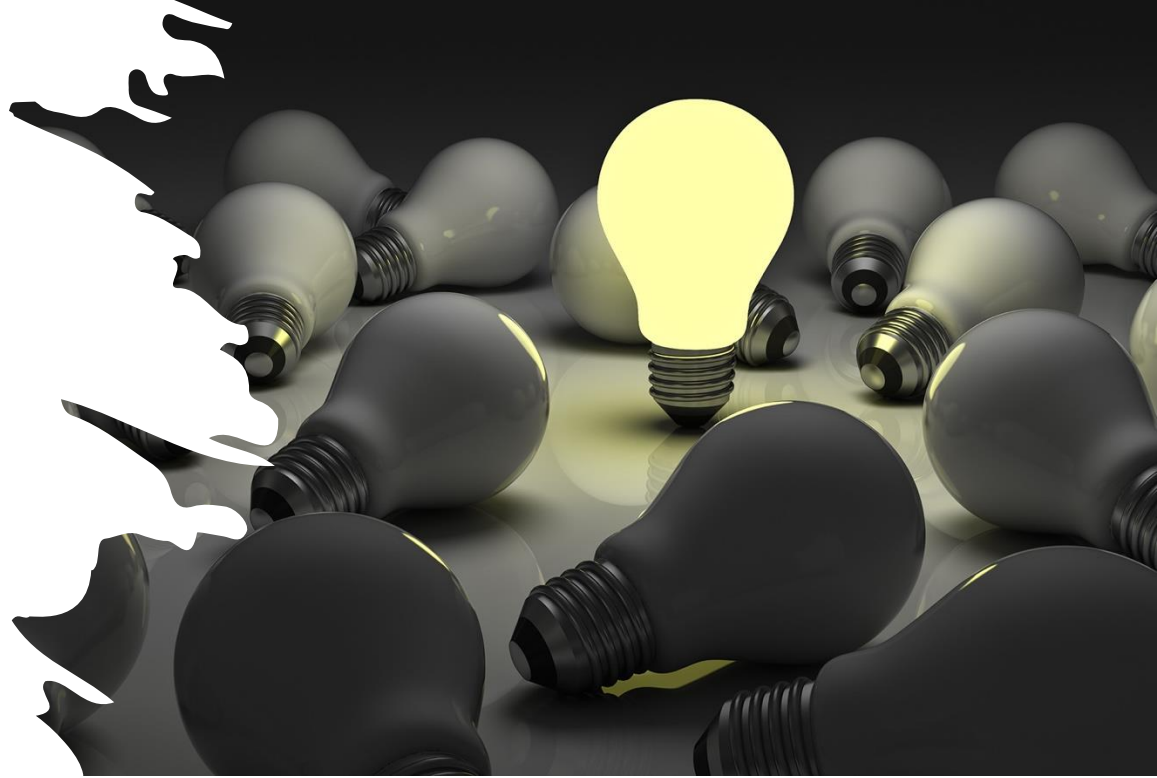


# Foundations and Corporations vs. Federal Grants

- ❖ Foundation funding can provide seed funding for projects needing more preliminary data
- ❖ Serve as bridge funding between grants
- ❖ Serve as a resume builder on researcher's CV
- ❖ Many offer significant funding >\$1 million
- ❖ Application can be less complex – but not always!!

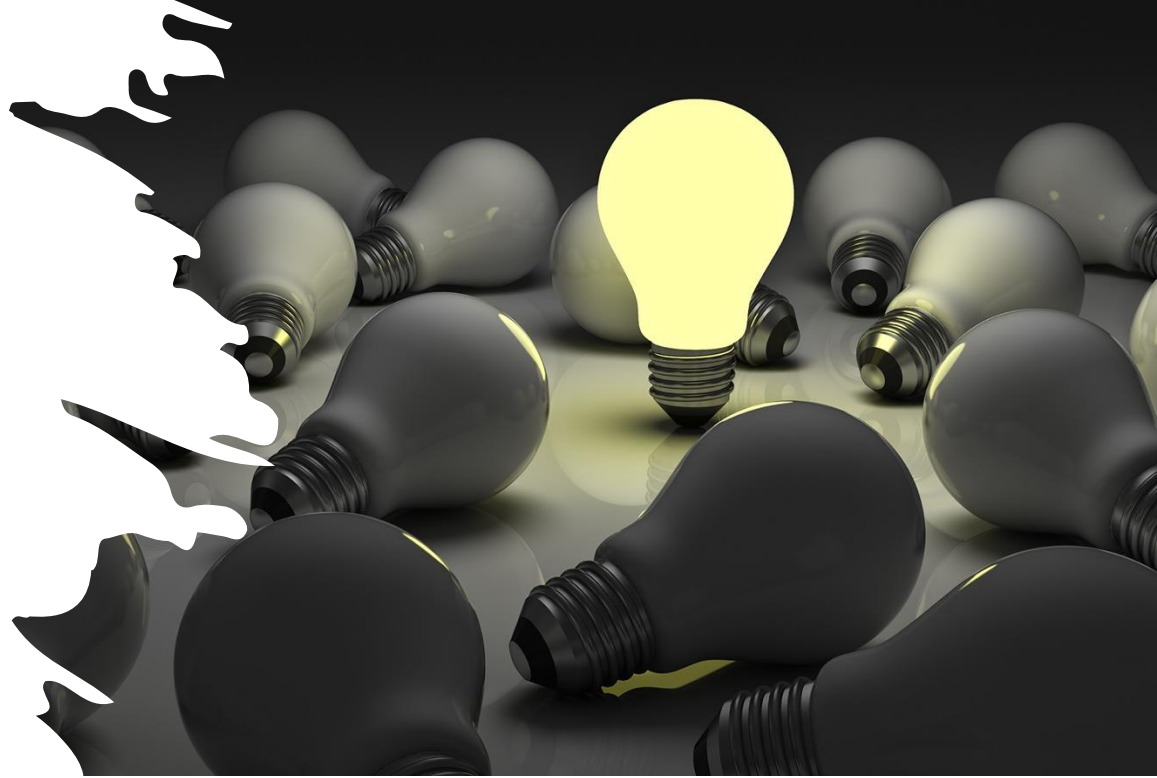
# Is Your Project Fundable?

- ❖ Is it doable?
- ❖ Can you answer the question “So what?”
- ❖ How is your project unique?
- ❖ Is there a focused goal that aligns with the corporation or foundation?
- ❖ What are our strategic plans for carrying out the project?
- ❖ Are there engagement opportunities for the corporation or foundation?



# Is Your Project Fundable? Cont.

- ❖ Can we identify who benefits and how this benefits the corporate or foundation donor?
- ❖ Why is ECU the best place to address this issue/need?
- ❖ How will we know that the project has had an impact (outcomes)?
- ❖ How will the project be **sustained financially** after the funding period?





# CFR Project Concept Form



## Corporate & Foundation Relations Project Concept Form

Applicant Information			
Principal Investigator/ Program Director		Date	
College/School		Phone	
Department		Email	
Project website (if applicable)			

Project At A Glance				
Proposed Project Name				
What are you asking a corporation or foundation to fund? (in 1-2 sentences)				
Duration of Project		Estimated Cost		
Type of Funding Needed (check all that apply)	Equipment	Programmatic	Research	Other (Please Specify)

**\*\* ATTACH OR COMPLETE SUMMARY BUDGET ON PAGE 2 \*\***

Project Information (Keep responses brief.)	
<b>What?</b>	Project description and mission
<b>Why?</b>	Project impact. Why is this project/research needed? If possible, address why ECU is uniquely positioned to do this work.
<b>Who?</b>	Address expertise and operational capacity. Include history of program and points of distinction.
<b>When?</b>	Proposed project beginning, ending dates. If available, include timeline highlighting critical steps.
<b>Where?</b>	Project's geographic scope
<b>How?</b>	Describe methodology (goals, strategic plans, local partners) and measurable outcomes/evaluation. How will you know the project has had impact or been successful?



## Corporate & Foundation Relations Project Concept Form

<b>Other Financial Support?</b>	Is there any funding currently in place? Does this project have income potential?
<b>Sustainability?</b>	State how project will be sustained beyond proposed funding period.

What corporations/foundations may have interest in your project?	
--	--

**\*\* ATTACH OR COMPLETE SUMMARY BUDGET BELOW \*\***

### Summary Budget

List major income/expense items. If multi-year request, show these items for each year. Funders like to see declining dependence on their dollars over the life of the project. Show total costs and then list the amount requested from the funding source under project total. The % requested compared to total cost matters.

Identified Funding Source	Description	Year 1	Year 2	Year 3	Total
<b>Total Funding Support Identified (all sources)</b>					\$

Expenses/Funds Requested	Description of the Need	Year 1	Year 2	Year 3	Total
<b>Total Project Cost</b>					\$
<b>Total Funds Requested from Corporation or Foundation</b>					\$
					% of Total Project Budget
					%

Signature of Associate Dean of Research

Date

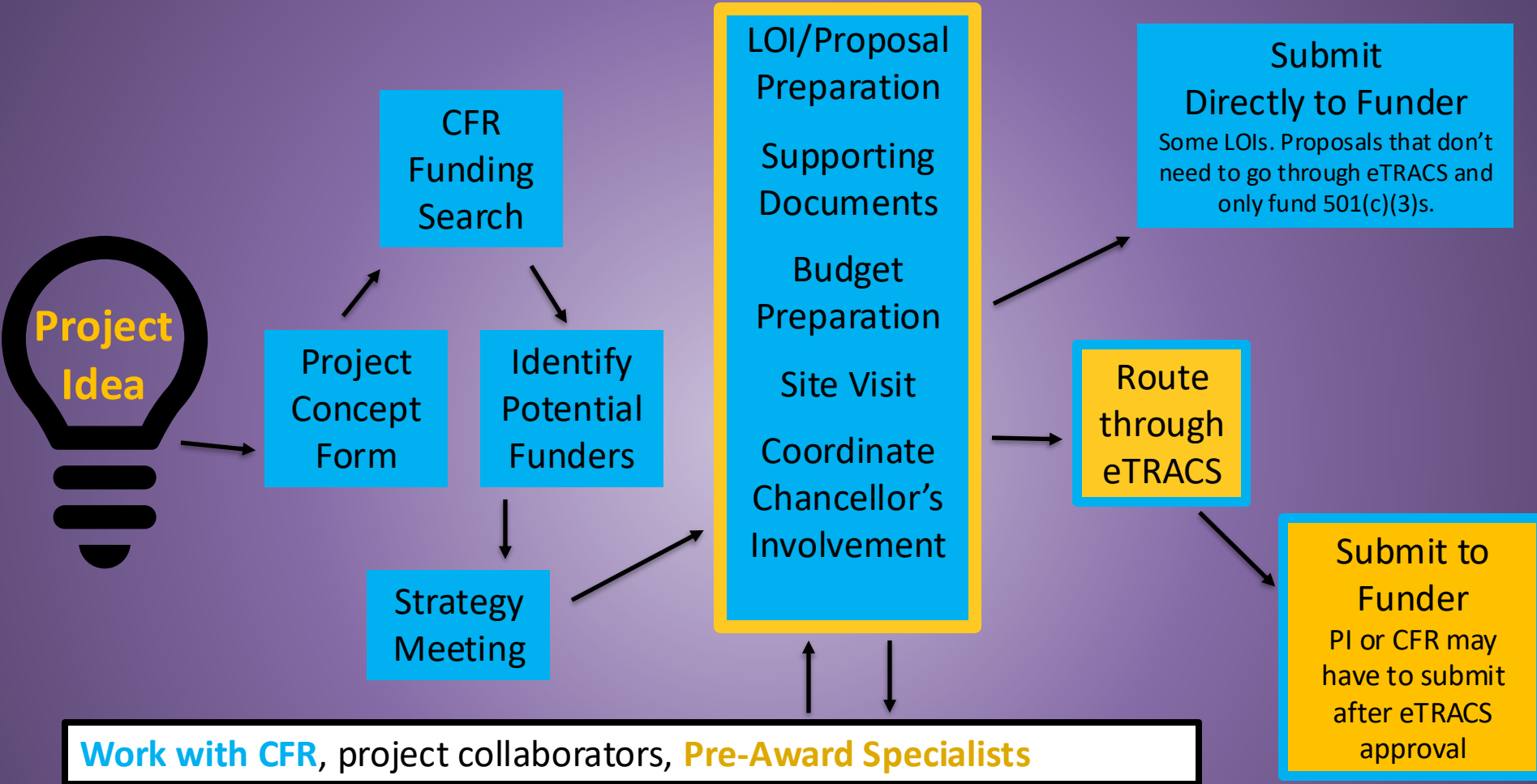
Please email the completed form to [ECU\\_CFR@ecu.edu](mailto:ECU_CFR@ecu.edu)  
Terah Archie - [Archie15@ecu.edu](mailto:Archie15@ecu.edu), or Katy Johnson - [Johnsonkaty23@ecu.edu](mailto:Johnsonkaty23@ecu.edu)



# CFR Funding Search Results

- ❖ List of potential funders that are a fit for your research or project.
- ❖ Links to the RFP, application page, and guidelines.
- ❖ Deadlines and funding limits.
- ❖ Link to F&A or Indirect Cost Policy (for eTRACS and F&A Waiver.)
- ❖ Do they fund government institutions or only 501(c)(3) organizations (i.e. ECUF, ECU Health)?
- ❖ Are they a new funder for ECU?

# Project Idea to Proposal: Working with CFR



# University Policies

- ❖ Faculty are required to inform CFR and the Office of Research Administration (ORA) before approaching corporations and foundations
- ❖ Faculty **do not** have signatory authority for ECU



# Q & A

