

Governors'  
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Alliance



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# Partnering with Private Foundations

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# What is a Private Foundation?

- All 501(c)3 charitable organizations are classified as private foundations unless they meet the requirements for a public charity --> diverse types of organizations can be private foundations
- Private foundations typically
  - have a single source of income
  - make grants to charitable organizations
  - have an IRS-mandated formula for distribution requirements (grants to government agencies are not qualifying distributions)

# Approaching Private Foundations

- Funding opportunities are built on relationships
- Must focus on the foundation's priorities
- Understand the culture of the organization
  - Are they open to direct contact, or require Letters of Intent first? What is their typical protocol?
  - Do they support operational funding or focus on programmatic initiatives?
  - What are the values of the organization and key leadership? (grassroots approaches; cutting-edge technology?)
- Requires a team approach (“Ambassador Teams”)

# Foundation Priorities Identified

- Gordon and Betty Moore Foundation
  - Priority: Ocean Planning
  - Currently a major funder of marine planning initiatives in the NE, Mid-Atlantic & West Coast
  - “Wrapping up” ocean planning priority by 2016 in favor of fisheries technologies
  - No established relationships identified
- Walton Family Foundation
  - Priority: Marine conservation via (1) MPAs and (2) creating economic incentives for ocean (fisheries) sustainability
  - They have supported organizations in the Gulf of Mexico, but other investments are west coast and international
  - Culture encourages advocacy
  - No established relationships identified
- National Fish and Wildlife Foundation (NFWF)
  - Priority: Restoration and management of ocean and coastal habitat
  - Focus largely on the Gulf, but have some funding in Chesapeake Bay and elsewhere
  - Primarily manage grant programs for other organizations rather than pursuing own priorities
  - Kelly Samek has a contact on the NFWF Board of Directors

# Foundation Priorities Identified

- **Z. Reynolds Smith Foundation**
  - Priority: Environment Focus Area that includes initiatives in clean air and water (incl. coastal waters and wetlands) and preserving the natural landscape (to protect and restore NC's mountain and coastal areas)
  - Focused on North Carolina
  - Culture encourages grassroots action and environmental justice
  - Bill Ross has a relationship with the Environment Program Officer
- **David and Lucile Packard Foundation**
  - Priority: Pioneer new approaches to the conservation of coastal ecosystems
  - Focused on West Coast
  - No established relationships identified
- **William and Flora Hewlett Foundation**
  - Priority: Building broad support for expanding clean energy and reducing climate change
  - Focused on Western region
  - No established relationships identified

# University Foundations

- Similar to our approach to business engagement, develop a network of University Foundations in the South Atlantic with an interest in ocean and coastal issues
- Capitalize on existing and new relationships through the Ambassador Strategy Group and others