

BUILDING RELATIONSHIPS WITH FOUNDATIONS IN A CHANGING FEDERAL FUNDING LANDSCAPE

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Presentation Overview

USF and SLU Reference Points

Changing Government Funding Landscape & Responses by Private Foundations

Why / How Relationships with Foundations are Beneficial

Tools for Identifying Foundations

Cultivating Engagement with New or Lapsed Foundations

Stewarding Relationships

Impact of Changes on CFR Offices

Presenters' School & CFR Team Reference Points

USF

9,000 students

3 UG Schools + Law, Education

Recent R2 Classification

3 FTE (via 4 people) CFR staff

SLU

15,000 students

Med, Law, Business, Dental,
Education, Social Work, Public Health

R1 Research Institute

3.5 FTE CFR staff

Both are part of their university's Development Division and focus on philanthropy, but work closely with sponsored programs (no official reporting)

Audience At A Glance

Raise Your Hand If:

- *You have a formal CFR role...keep raised if it's a full-time role
- *You have 0-3 years of experience with CFR work...if you have 4+ years
- *Your school is in a campaign...keep raised if CFR has a \$ goal for the campaign
- *You are a gift officer that collaborates with CFR staff on occasion
- *You are new to CFR and are here to learn!

Implications of the OBBB *Specific to CFR Work*

- **Increased Competition for Limited Philanthropic Dollars**

New tiers for excise taxes levied on endowment funds may reduce universities' available budgets, leading them to seek more funding from philanthropic foundations.

- **Potential Disincentive for Charitable Giving**

The new 1% floor on the deduction for charitable contributions could deter some corporations from making charitable donations to higher education institutions.

Implications of the OBBB *Specific to CFR Work*

- **Foundations May Shift Funding Focus and/or \$ to Basic Safety Net Needs**

Cuts to Medicare and Medicaid coverage will increase the numbers in vulnerable populations who will need to rely on support provided by private sources.

- **Increased Need/Demand for Graduate Student Scholarship Support from Fdns**

Elimination of Grad PLUS loans and new federal loan limits may mean students need to seek private loans - at higher rates - to cover tuition if private scholarships are not available.

Fdn Responses to Changing Gov Funding Landscape

Foundations provide ~10% of what government provided. They cannot fill the gap now left by government cuts, but many are trying to “meet the moment” by:

Increasing their giving

- Spencer Foundation: Offering \$25K grants to address immediate needs stemming from NSF terminations.
- Marguerite Casey Foundation: Adding +\$130M to support racial and economic justice in wake of attacks on DEI.
- MacArthur Foundation: Increasing grant spending from 5% to 6% of endowment.

Fdn Responses to Changing Gov Funding Landscape

Altering their application process - Competition has grown ten-fold

- Arnold & Mabel Beckman Foundation: moved from invite-only to open-call
- Spencer Foundation moved from Intent to apply, to pre-proposal due to increase in # of applications

Posting or providing IDC rates - some foundations never offered any before

Impact to Foundations on Govt Shifts

President of Simons Foundation is encouraging incorporation of data to demonstrate impact - building and owning your data is critical

If data is not shared, you must build your own

Collaborate with other Universities - Partners, not competition

Sloan is pivoting to support the collection and use of data

As support for Grad students goes away, developing the next generation of scientists by supporting graduate and post-doc students will be critical.

Benefits of Strengthening Relationships with Foundations

- Inside intelligence not discernible from their website
 - Revising strategy
 - Change in leadership
 - Areas of importance
- Access to hardline, deeper questions from funder's perspective
 - How they wish to see impact measured
 - What they view as a realistic sustainability plan
- Established relationships can lead to referrals to national and/or closed foundations

Additional Support Foundations Provide

- Insights on industry trends
 - What the org sees coming down the line, and how they are responding
- Free trainings & information forums
 - Notable speakers on timely topics & capacity building support
 - CFR can pass opportunities along to faculty working in the featured space
 - Examples: [Patrick J McGovern Foundation's Launch Workshops](#)
Deaconess Foundation Leadership training

Identifying Foundations: Databases

- [Candid - Foundation Directory](#)
Subscription start at ~\$1K+ per user / Public Library often has access
- [InfoEd SPIN Database](#)
“World’s Largest Database of Sponsored Funding Opportunities”
Your school’s Office of Sponsored Programs may have access to share
- [FADICA's Catholic Funding Guide](#)
2,045 funders - \$229/year
- [Altum - Proposal Central](#)
- [Duke Research Funding](#)

Identifying Foundations: Research Methods

- Analyze past funders at your own University
- Subscribe to industry publication for leads and trends
[Candid's Philanthropy News Digest](#)
[Chronicle of Philanthropy](#), [Chronicle of Higher Education](#)
[Inside Philanthropy](#), [Inside Higher Ed](#)
- Sideways research - following the breadcrumbs
- Sign up for specific Foundation Newsletters

Cultivating Relationships - Top 5 Tips

1) Subscribe to a foundation's online newsletter

Reach out by email or phone to invite conversation with program officers, linking the foundation newsletter update with university programming / faculty research in those areas.

Example: [Haas Jr. Fund](#)

Cultivating Relationships

2) Search [LinkedIn Live Alumni](#) for alumni that work at the foundation or corporation

Reach out to alums for assistance with connections and to serve as internal “champions” - tell them who you are trying to reach and ask for their support.

Set google alert with the company/foundation as a keyword - forward press about their organization that aligns with a program/project at your school to keep alignment on their radar.

Cultivating Relationships

3) Leverage faculty connections in their area(s) of expertise

Example: [San Francisco Foundation](#)

4) Tap school/college/unit advisory board connections

USF example: [Genentech](#)

5) Be in the places foundation officers & corporate reps are speaking/gathering
CASE conference panels, Grantmaker Association events, Common Wealth Club

Stewardship to Advance Relationships

- Extend thoughtful, curated invitations to campus
 - Popular sporting events at your school
 - University or school speaker series [VIP receptions]
 - Plays and productions aligned with fdn priorities
 - Tour of facilities projects [photo opps of projects they've funded in the past]
 - School/College/Unit events [end of year open house/poster sessions/summits]
- Attend events to which the foundation/company invites you/the university!
- Forward news stories or results of the funded program to foundation for them to share with their board.

Stewardship to Advance Relationships

- Organize a special meeting and/or meal with student scholarship recipients / program participants
- Invite program officers / executive directors / board members to speak on a topic on which they are published to various audiences: students / faculty / university leadership / trustees
- Commemorate a milestone anniversary of support with a hardbound book detailing the impact of the foundation's support [student profiles, photos, quotes, outcome and impact data for university and community]

CFR Teams' Responses to Increased Demand for Private Foundation Funding

- Response rate to RFPs for Private grants had been ~2%, now at ~30%
- Need to educate faculty and internal reviewers on how private grants work
- Refine processes with sponsored programs for efficiency & increased activity
- Required coordination among applications and beware of limitations

DISCUSSION / Q & A

Thank you for attending - *see you next year!*

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