

# Philanthropy 101 for State Government: What State Government Should Know about Charitable Foundations

May 2024

On May 7, OSP hosted a virtual session for state government agency staff to learn about charitable foundations and philanthropic grantmaking in North Carolina. Juli Kim, OSP [Philanthropy Liaison](#), facilitated the session. Sarah Mann Willcox, Executive Director of the [North Carolina Network of Grantmakers](#) (NCNG), shared fundamental information about North Carolina's philanthropic sector, including the types of foundations working in North Carolina, their governance structures, the scope of their philanthropic investments, and the range of resources that philanthropy may offer working collaboratively with state government agencies.

## Speakers

**Juli Kim (facilitator)**, Philanthropy Liaison, NC Office of Strategic Partnerships

**Sarah Mann Willcox**, Executive Director, North Carolina Network of Grantmakers

## Key Takeaways

1. No two foundations are the same.

- Foundations vary in their priorities, geographic scope of interest, and governance structures which has implications for their grantmaking interests and processes.
- State agencies interested in working with philanthropy should spend time (a) researching prospective partners for alignment on the potential collaborative opportunity, and (b) developing relationships with foundation staff.

2. The scope and scale of philanthropy is often misunderstood.

- State government funding for K12 education for 2023-24 was \$12B. By contrast, in 2021, philanthropic giving from North Carolina based philanthropies across all issue areas was about \$2B from an asset base of approximately \$28B.
- Philanthropic funding in North Carolina can fill gaps, provide pilot and/or supplemental funding, and can often be used in more flexible ways than government funding.

3. Philanthropies do more than make grants.

- Foundations are experts on the communities they serve and often have subject matter expertise related to their funding interests.
- Foundations have community recognition and relationships with a wide range of community-based organizations and leaders. For these reasons, foundations can provide thought partnership and strategic guidance to state government partners, as well as facilitate and support state agency interactions and engagement with local partners.

## Discussion Topics

Following is a high-level overview of topics discussed in the webinar. Timestamps denote the beginning of topic discussions for ease of access to specific segments of the recording, which is available [here](#).

1. Program introduction (0:00)
2. North Carolina Network of Grantmakers organization, programs, services, members (3:00)
3. Charitable foundations vs operating or fundraising foundations (5:55)
4. Scale of charitable giving in North Carolina (7:14)
5. Foundation resources and ways that philanthropy can partner with state agencies (13:56)
6. Types of charitable foundations (16:30)
7. Limitations of charitable foundations (26:45)
8. Building relationships with foundations (30:00)
9. Discussion/Q&A (31:10)

## Resources

*The following resources were shared or highlighted during the program. This is not intended to be a comprehensive list of information or resources.*

### [Philanthropy 101 for State Government](#)

These slides accompanied the webinar presentation.

### [The North Carolina Network of Grantmakers](#) (NCNG)

The North Carolina Network of Grantmakers is committed to helping private foundations, corporate giving programs, donor advised fund holders, and community foundations strengthen their impact and effectiveness. The network's membership includes private foundations, community foundations, and corporate foundations and giving programs.

### [NC Office of Strategic Partnerships](#) (OSP)

OSP develops, launches, and enhances partnerships between state agencies and NC's research and philanthropic sectors. This includes elevating state government's internal capacity to use and generate evidence in its policy and programmatic functions. As part of this work, OSP develops resources about cross-sector partnerships, including through the Philanthropy Liaison.

- [OSP Philanthropy Liaison](#): OSP and philanthropy partners co-created the Philanthropy Liaison role to support both government and philanthropy. A unique role nationally, the Philanthropy Liaison focuses on educating the two sectors about each other; facilitating connections related to mutual interests; and supporting cross-sector partnerships and collaborations.
  - [State Government and Philanthropy Partnerships: Learning from Three Impactful Collaborations Monthly Connect, OSP Monthly Connect \(August 2023\)](#): Working together, state government and philanthropy can leverage their expertise and resources (e.g., relationships and capital) to maximize impact for the people and communities they serve. In this OSP Monthly Connect, speakers representing state government-philanthropy partnerships describe each partnership and how it relates to their shared interests; discuss components of the partnerships, including what each partner brings to the collaboration and how they address challenges; and highlight evidence of successful partnership.

- [\*\*What Philanthropy Wants Working in Partnership with State Government, OSP Learning Forum \(April 2024\)\*\*](#): In this session, featured at the NC OSP Learning Forum, held April 11, 2024 at the NC Museum of Art, representatives from North Carolina philanthropies discussed philanthropy's interest in working with state government agencies, perspectives on opportunities to collaborate, ways to leverage each other's resources, and critical elements of engagement and relationship-building.
- Other OSP resources include:
  - [\*\*Agency Contacts for Partnerships and Research\*\*](#): A list of state agency representatives who are designated as an initial point of contact for partnerships such as research projects, grant proposals, and other collaborative opportunities.
  - [\*\*Highlights e-news and resources\*\*](#): A monthly communication that includes information on events, partnership opportunities, resources, internship opportunities, and more. [Subscribe to Highlights](#).
  - [\*\*North Carolina Project Portal\*\*](#): A tool for sharing state agency research opportunities and needs and for people to express interest in partnering on those opportunities.
  - [\*\*Strategic Partnerships Monthly Connect\*\*](#) – OSP's Monthly Connect virtual panel discussions highlight cross-sector partnerships addressing a range of topics relevant to North Carolina partnerships among state government, research, and philanthropy.