



These slides accompanied the Office of Strategic Partnerships' "Philanthropy 101" presentation and discussion session held on April 8, 2021 with state agency representatives. As such, some context may be lost if viewing the slides without the benefit of the discussion.



# PHILANTHROPY 101

*for state agencies*

NC Office of Strategic Partnerships  
April 8, 2021



# AGENDA

**Joy Vermillion Heinsohn**  
Philanthropy Liaison,  
NC Office of Strategic  
Partnerships

**Ret Boney**  
Executive Director,  
NC Network of Grantmakers



Welcome and Housekeeping



What is Philanthropy?



Landscape of Philanthropy in NC



Building Relationships with Funders



Q & A

# Welcome & Housekeeping

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Recording this session

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What is a Philanthropy Liaison?

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Who is this session for?

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Name & agency in chat

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Q & A at end

# What is Philanthropy?

***Philanthropy:*** Philanthropy is defined in different ways. The origin of the word philanthropy is Greek and means love for mankind.

**Today, philanthropy includes the concept of voluntary giving by an individual or group to promote the common good. Philanthropy also commonly refers to grants of money given by foundations to nonprofit organizations.**

Philanthropic giving supports a variety of activities, including research, health, education, arts and culture, as well as alleviating poverty.

# What is a foundation?

In layman's terms, "foundation" is used most commonly to describe organizations that distribute funds for charitable purposes, typically as grants or scholarships.

There are many different kinds of foundations (independent, family, corporate, operating, etc.).

However, just because an organization has the word "foundation" in its name does not mean that it makes grants.

Other terms that are often synonymous with "foundations" include "funders" and "grantmakers."

# What is a foundation?

For more information, visit:

[www.foundationsource.com](http://www.foundationsource.com)

or

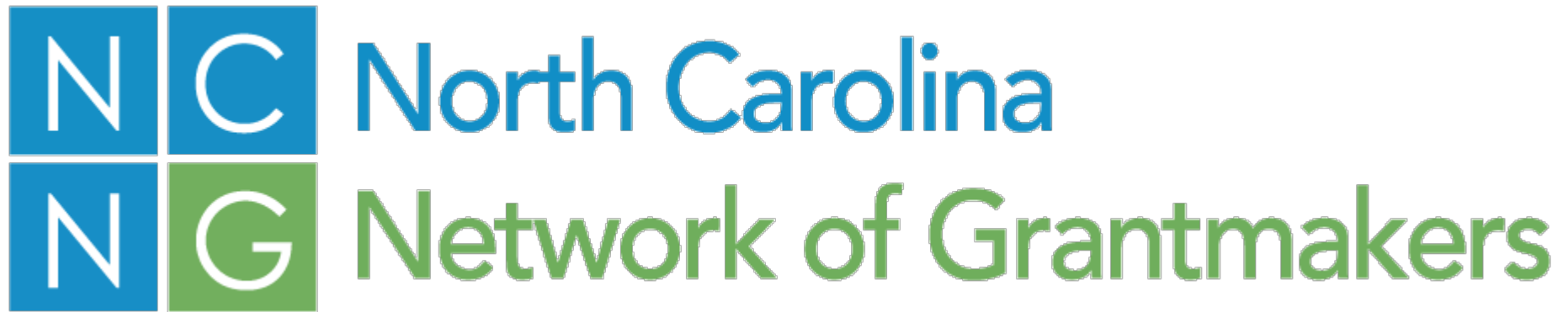
[www.cof.org](http://www.cof.org)

# North Carolina's Philanthropic Landscape

Ret Boney, Executive Director

North Carolina Network of Grantmakers





**Network Comprised of 115 Foundations**

Community Foundations

Corporate Foundations and Giving Programs

Private Foundations (Independent and Family Foundations)

Public Grantmaking Charities

# Beyond the Dollars



Content Expertise



Local Expertise



Convening Power



Education and Advocacy



Capacity Building

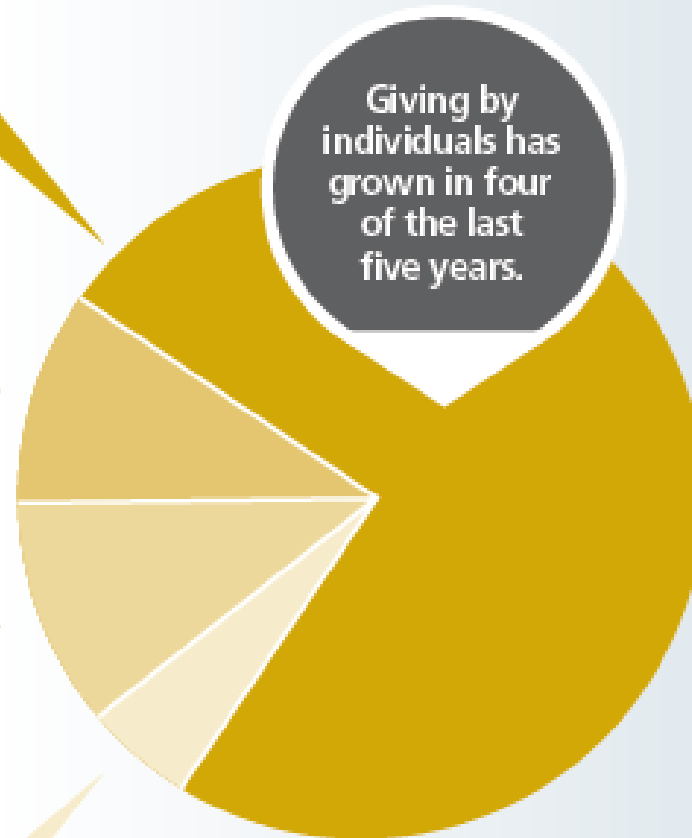
## Contributions by source (by percentage of the total)

**69%** **Giving by Individuals** **\$309.66 billion**  
increased 4.7 percent over 2018.

**17%** **Giving by Foundations** **\$75.69 billion**  
was 2.5 percent higher than in 2018.

**10%** **Giving by Bequest** **\$43.21 billion**  
had flat growth of 0.2 percent over 2018.

**5%** **Giving by Corporations** **\$21.09 billion**  
increased 13.4 percent over 2018.



\* All figures on this infographic are reported in current dollars unless otherwise noted.

In 2019:  
Americans  
gave  
**\$449.64B**  
to charity

# North Carolina's Foundation Landscape

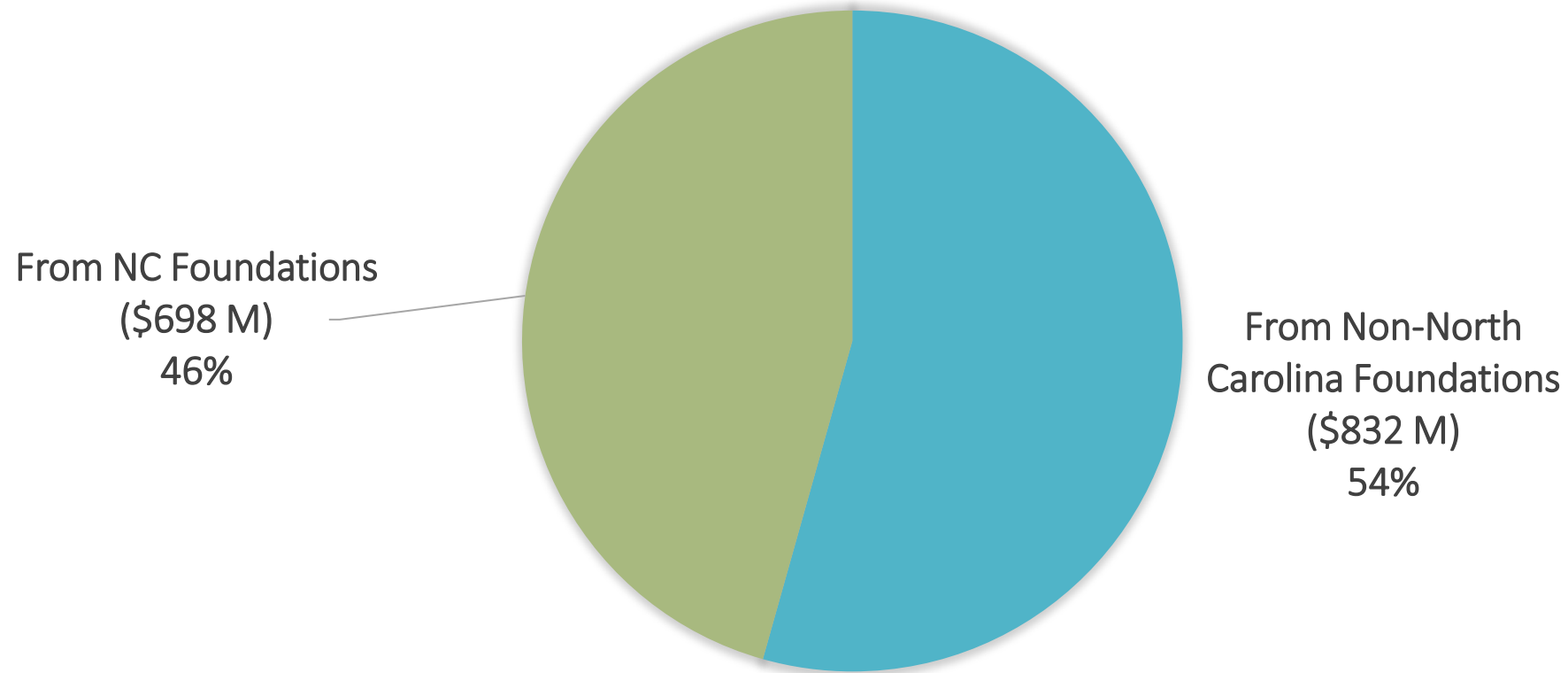
2,557 Foundations

\$18.4 Billion in assets held by NC foundations

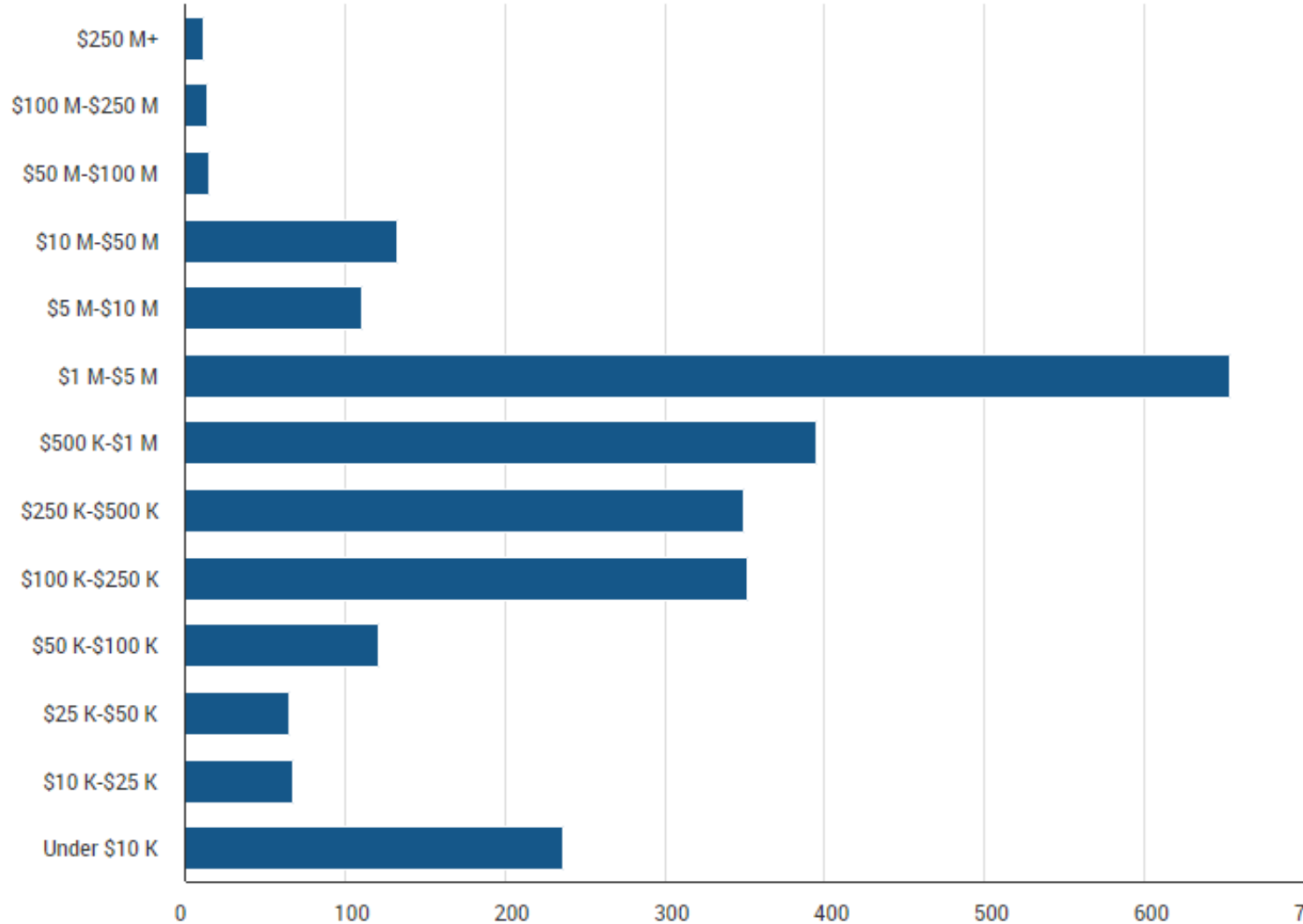
\$1.5 Billion in total giving in 2018 *by* NC foundations

*- Of this, about \$698 Million stayed in NC in 2018*

# Total Foundation Giving to North Carolina Just over \$1.5 Billion in 2018

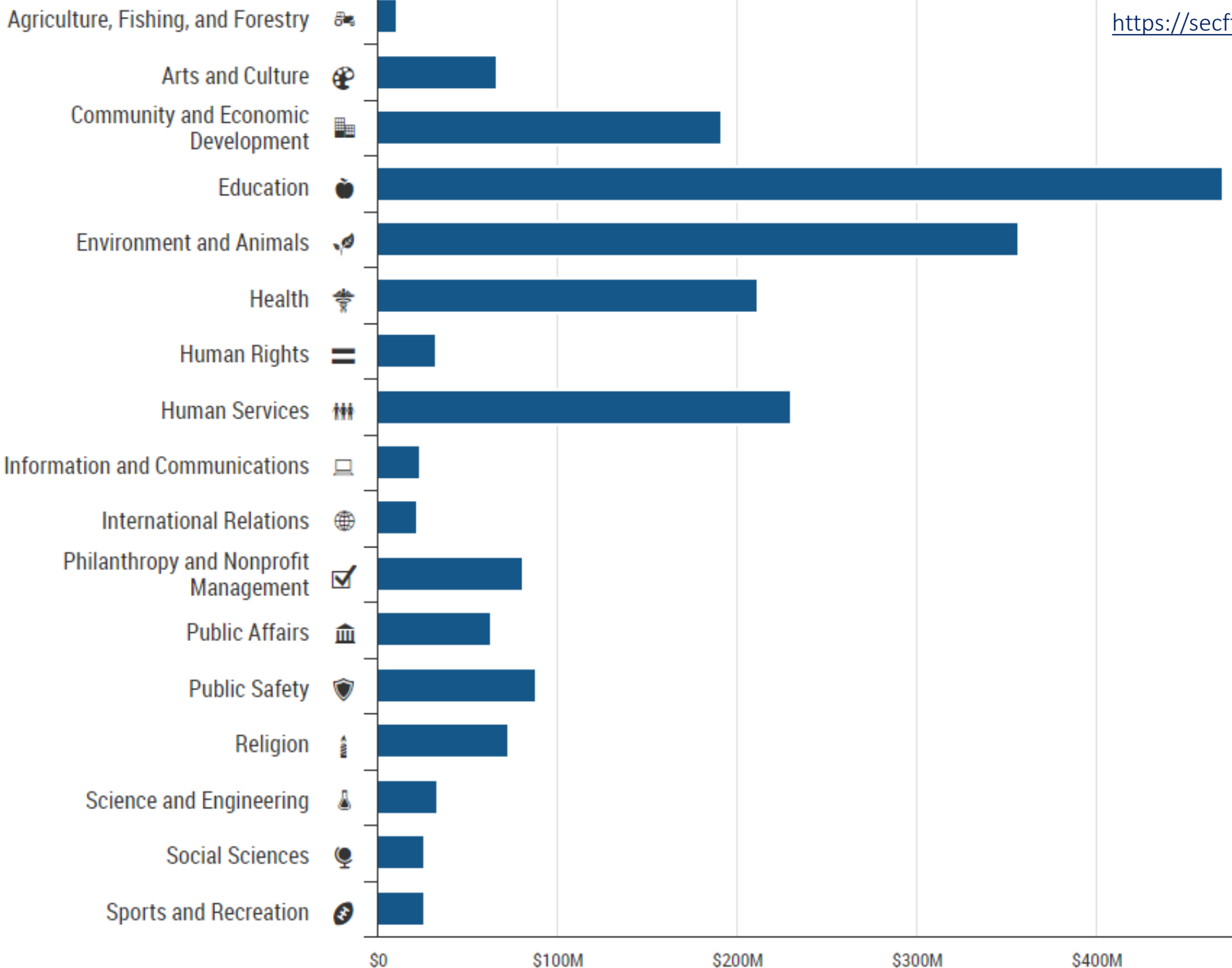


# Asset Range of North Carolina Foundations



Number of North Carolina Foundations

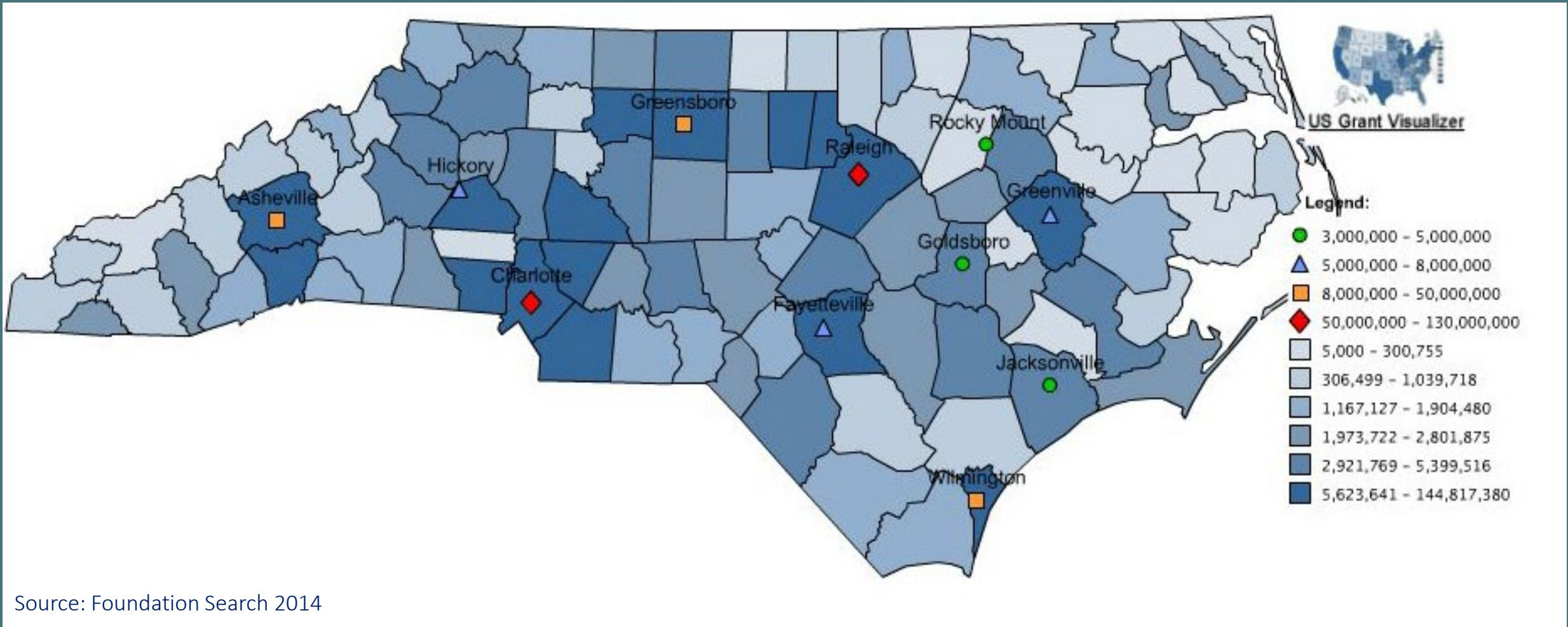
Most foundations based in NC are relatively small - \$1M in assets or less



## Giving by Subject:

*Of North Carolina Foundations in 2018*

*(Grant dollars)*



# Geographic Distribution of Grants





Most prevalent type of foundation



Investment earnings are source of most grantmaking dollars



Annual payout of at least 5% of assets



Provide almost half of North Carolina's total grant dollars



For family foundations, family priorities often guide giving decisions

## Private Foundations *(Family and Independent Foundations)*



Foundations can be funded as separate legal entities



Many have foundation and a corporate giving program



Give about 15% of North Carolina's total grant dollars



Underlying business values and strategies often guide giving decisions

# Corporate Foundations and Giving Programs



Tied to a specific geographic area



Variety of funds from unrestricted assets to endowed funds to donor-advised funds



Provide about one-third of NC's total grant dollars

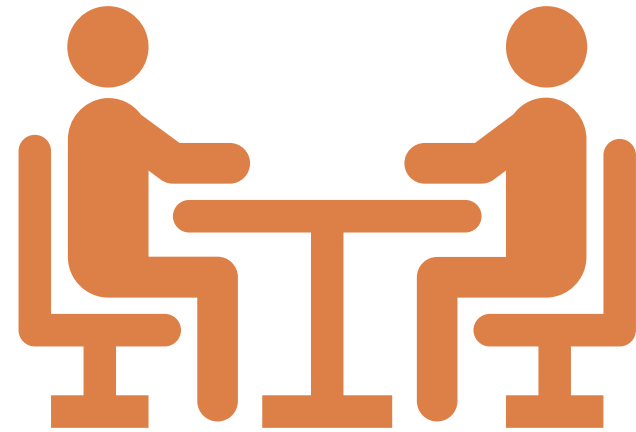


Community needs/priorities guide many decisions

# Community Foundations

Questions?

BEYOND  
THE  
MONEY?



# Additional foundation resources...



EXPERTISE



CONVENING &  
FACILITATION



COMMUNITY  
RELATIONSHIPS

## Tips on building relationships with funders:

- What's your goal? Seeking a thought partner is different from seeking funding.
- Funders ≠ easy replacement money for lost state funding.
- No two funders are the same. Different priorities, geographies, restrictions, applications, etc.
- Do your homework. Read their website before making a cold call.
- Sign up for funders' newsletters and alerts.



HOW TO  
APPLY FOR  
GRANTS?

**STAY TUNED!!!**





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