



**Pre-Conference Mentoring Meeting**  
April 6, 2021 from 12:00 to 1:30 pm Eastern

***Three Steps for Seeking Funding for Your Research***  
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### **Step 1. Clarify Intentions**

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Funding is a result of earned trust. The primary objective of researchers who seek funding is to earn the stakeholders' trust that makes philanthropic investments possible. Stakeholders include the collegial networks who can vouch for you over time, institutional partners who ground initiatives that provide stability in the field, and the funders who strategically invest in projects that align with their mission. Trust is not a given. Trust is earned.

To earn trust, begin by acting with generative intentions. Start with an honest self-evaluation of what is truly motivating you. What are the visceral emotions and notions that drive your pursuit of funding? What do you believe about money (see p. 2), and what do you think is happening when people fund your research? What do you think about your role and the role of others?

Doing this internal work can be liberating. For instance, some researchers can be driven by unhealthy emotions that cloud their thinking: an [inferiority](#) complex ("I'm not good enough to receive funding."), a [superiority](#) complex (the zero-sum thinking that "We should have gotten that grant, not them"), the [entitlement](#) complex ("I'm the one that should have..."), and the [independence complex](#) (self-deceptive idea that "I'll do it myself"). Challenge these unhelpful thoughts and cultivate one's intellectual self-worth. Develop an other-centered agenda grounded in interdependent relationships rooted in mutual trust.

Challenge the unhelpful ideas that researchers bring to their fundraising (see table). For instance, abandon transactional notions that money is an object, you want what others have, with false notions of who they are and their social status. Replace these counterproductive ideas with a relationship-centered plan. Money is a symbol of a relational investment. Receiving grant, contract, or fellowship is a vote of confidence based on who the stakeholders are at their core, what they value, who they cherish, and who they respect.

Abandon the impulse to approach each funding proposal with the physical disposition of a handout—[Oliver Twist's](#) famous words, "Please Sir, I want some more." Your palms are not up and open. You are not asking for help. You are not soliciting a donation to fulfill your needs. You're not pleading for a handout. Buck up—you're offering a handshake. You are submitting your unique talents to serve others. You are offering an invitation to collaborate, form a meaningful relationship, and help others learn something of significance while assisting philanthropists in meeting their mission and manifesting their values.

*Abandon these Notions*

*Cultivate these Intentions*

<b>The Transaction</b>	<b>The Relationship</b>
<ul style="list-style-type: none"><li>• Money as object</li><li>• What people have</li><li>• What they fund</li><li>• Who they are, who they know</li></ul>	<ul style="list-style-type: none"><li>• Money as relationship, a symbol of trust</li><li>• Who people are</li><li>• What they value</li><li>• Who they cherish, who they respect</li></ul>
<b>The Handout</b>	<b>The Handshake</b>
<ul style="list-style-type: none"><li>• Palms up and open</li><li>• Asking for help</li><li>• Solicitation for donation</li><li>• Seek donations to fulfill my needs</li><li>• Help us meet my needs</li></ul>	<ul style="list-style-type: none"><li>• Handshake, based on mutual trust</li><li>• Offer to serve, offer to help</li><li>• Invitation to collaborate</li><li>• Building alliances to meet other's needs</li><li>• Help philanthropists live their values</li></ul>

### ***“Money Types” Reveal Intentions***

One of the pitfalls that leaders face when launching a fundraising campaign is to assume that everyone speaks the same “money language.” They do not. Consider the work of financial advisor, Brent Kessel who articulated seven “money types” in the book, *It's Not About the Money*.

- *Guardian*
- *Pleasure Seeker*
- *Idealist*
- *Saver*
- *Star*
- *Innocent*
- *Caretake*
- *Empire Builder*

By becoming fluent in these languages, you become more aware of your unconscious motivations, or as Kessel calls the “core money story.” Work with your colleagues to study how each money type has positive and negative attributes. When we become fluent in the language of money, we are better poised to resolve money-based conflicts, examine our true intentions about seeking funding, and apply each money type's character strengths in different contexts.

## Step 2. Identify the Kernel

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After getting clear about what motivates you, begin the intellectual work of “shucking”—peel the husk from the corn to discover the kernel of your big idea. Just as funders will ask, *Who shall we fund?* (examining their motivations, reputation, expertise, and so on), they ultimately ask, *What will we support?* To get at the heart of this second question, identify the project’s kernel with specificity. What are the precise outputs of your project? What are the deliverables and tangible products? Articulate the urgency and significance. Make a case for how investment in your project will result in a timely and timeless contribution. What problem does your project solve? What contributions are you making to the field? What impact will it have for whom? Use the insights by organizational developers John and Miriam Carver<sup>1</sup> to ask yourself, (1) “**What Benefit** does our research project offer? What impact, difference, change, or outcomes are obtained in the lives of the populations we serve?” (2) “**Who Benefits** from our research, and what is it about the identities and characteristics that make the project worthy of community investment?” (3) “**What Priority** does this project have in light of our other commitments and the priorities within our organization? What expense, relative worth, or relative cost does this project have concerning the priorities of our research team, our institution, and our philanthropic partners?”

## Step 3. Diversify Sources

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Some of the most successful fundraisers have a diverse philanthropic portfolio. They build a diverse set of stakeholders to bolster their fundraising efforts, ensuring that their projects are not dependent on one income source. Successful research projects have a variety of investors:

- a. **Individual Philanthropic Investors** annually contribute by offering their “time, talents, treasures.” Start-up organizations tend to have one or two Angels that provide significant funding for a new nonprofit organization’s operating budget. Larger foundations perceive many gifts over its first five years as a sign of community confidence in the project.
- b. **Individuals and Families** contribute one-time (e.g., crowdfunding) or annual unrestricted gifts to support the project’s or the organization’s global mission.
- c. **Charitable Partners** are foundations that issue research grants, fellowships, post-doctoral research funding, dissertation grants, and student scholarships. See a list of 201 charitable partners at [www.religionanded.com/resources/funding](http://www.religionanded.com/resources/funding). Large charities often limit their giving to 501(c)(3) nonprofit organizations, whereas others permit individuals to apply for grants. Be realistic about your ask because most successful grants represent a small percentage of a grantee’s operational budget. Use the [IRS charities search](#), Candid.org, Foundation Center, or GuideStar to pull the public 990s to learn which grants they issued over what years.

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<sup>1</sup> As articulated by Dr. John Carver, the founder of the Policy Governance® model, used to cultivate best practices in governing and administering nonprofit organizations. Recommended books: John and Miriam Carver, *Reinventing Your Board: A Step-by-Step Guide to Implementing Policy Governance*; and John Carver, *Boards That Make A Difference: A New Design for Leadership in Nonprofit and Public Organizations*, New York: Wiley, 1990.

- d. **Event partners** are programmatic partners who provide monetary and in-kind support (e.g., space, technology) to host academic and fundraising events. What benefit could your research project have in gathering people for a community event? Gathering people will be an essential strategy for bringing greater visibility to your research, thus reaching additional donors.
- e. **Government Partners** are local, state, federal, or international agencies that issue grants and contracts. See calls for proposals at the National Endowment for the Humanities, the National Endowment for Democracy, and National Endowment for the Arts. State school boards and local school districts contract with researchers to study the effects of their policies and programs. Be proactive about how your research is vital to the government's success.
- f. **Corporate Partners** support research for various reasons, but mostly to show they are investing in a community or noble cause. After identifying your research plan—*what benefit*, *who benefits*, and *what priority*—consider approaching businesses foundations. Corporate sponsorship is often a result of the compatibility between their businesses' mission and your research project—the higher the community impact and visibility, the greater the chances of receiving a corporate grant.
- g. **Education Partners** are programmatic collaborators who provide monetary and in-kind support to host educational events. Often universities require an overhead fee to serve as a fiscal sponsor of your grant. Work with a development officer at your institution to learn about the budgetary stipulations.
- h. **Professional Associations** are programmatic partners who provide monetary, and in-kind support research collaborations. Some associations are recent of grants designed to issue scholarships, fellowships, research projects, innovation grants, and recognition awards. In addition to AERA, see the American Academy of Religion, the National Council for the Social Studies, the Society of Biblical Literature, International Qur'anic Studies Association, the ASCD, National Association of Student Affairs Professionals, Association for the Study of Higher Education, American Association of Teachers, American College Personnel Association, American Federation of Teachers, American Bar Association, National Parent Teachers Association, National Education Association, American Association of School Administrators, and so on.
- i. **Religious Organizations** fund academic research, especially about the efficacy of religious education and faith formation in private schools. This partnership can come with some professional risk because funding from religion to study religion can result in actual or perceived conflicts of interest. It can result in implicit or explicit limitations on a researcher's academic freedom.
- j. **Advocacy Organizations** often benefit from original research to justify their mission. Consider how your research project may help a particular population and identify which advocacy organizations serve those populations. This partnership can come with professional risks that need to be weighed against the potential benefits.

I hope these three steps are helpful. Please let me know if you have additional questions or would like to schedule a collegial brainstorming session. I can be reached at [nwalker@1791delegates.org](mailto:nwalker@1791delegates.org).