FACTORS FOR EFFECTIVE ENGAGEMENT OF PHILANTHROPY IN EDUCATION

'What do you perceive to be the key ingredients for successful philanthropic engagement in education?'

In response to this question, people could identify any aspect of grant seeking or grant making (e.g. identification of a need, matching, delivery of a program or project, acquittal or dissemination issues). They were also free to do so from any perspective (i.e. school, not-for-profit or philanthropy).

Over 250 critical ingredients were identified and then thematically analysed to produce 10 success factors of highly effective engagement of philanthropy in education. (See below)

Every respondent group was represented in every success factor. But how these factors might be reflected in practice could vary in terms of the context (e.g. size of the grant, scope of the project, level of experience of grant maker or seeker) and the lens through which the success factor was being described (i.e. philanthropy, education or not-for-profit).

The initial themes of success and illustrators of perceived effectiveness provide a starting point for further debate and discussion.

Highly effective engagement of philanthropy in education is thought to have evidence of:

Success factor	Indicators may include…	Illustrative quotes
Building capacity	- pooling funds - assistance with networking and forming partnerships with eligible organisations (knowing who and how) - assistance with the application process (samples, examples, mentoring, meeting locally to discuss project) - improving the knowledge and capabilities of applicants	*Organisations making contact with the school with the offer of assistance. We are TIME POOR!!!!!* (School) *We need to be able to have the skills to develop partnerships, write applications and develop frameworks for implementing and evaluating these.* (Not-for-profit) *Release and empower education leaders to engage with philanthropic opportunities.* (Philanthropy)
Making informed decisions	- Evidence-based identification of need - Track record - Ground-up identification of need - Needs that are appropriate, important and a priority for all who are affected - Weighing up the costs vs the benefits	*Genuine need within a community, hopefully that has been identified by the school community, should be the starting point for any engagement.* (Philanthropic) *Clear articulation of need and outcome. Clear understanding of priority.* (Not-for-profit) *Realistic picture of how likely the partnership is to happen and to meet identified needs.* (School)
Having appropriate knowledge	- Knowing who are the philanthropic foundations or trusts interested in funding education - Knowledge about the issue, which is the focus of the grant - Knowledge about the community or context for the proposed grant	*Professional experience and understanding of the sector: across newest research, government policy, teaching practice and impact of socio-economic areas of need on learning and connectedness to school.* (Philanthropic) *A deep understanding of the education sector.* (Not-for-profit) *A clear understanding of what areas [philanthropy] is interested in assisting schools and young people to develop.* (School)
A 'good fit'	Aligned values and objectives	*Write the application to the criteria.* (Not-for-profit) *Matching the needs of the school with the needs of the foundation* (School) *Philanthropy is reactive for the most part, we need to ensure that what the sector is reacting to is appropriate, important and a priority for everyone involved.* (Philanthropy)

Success factor	Indicators may include…	Illustrative quotes
Commitment of appropriate resourcing	• Longer-term granting relevant to the needs of the project or program • Pre-application phase: time, interest in discussing ideas • Sufficient funding within the grant for activities associated with partnering and preparation of the application	*We need continued support financially in programs once started so they can continue for the benefit of the recipients.* (School) *Philanthropist commitment of time and interest.* (Philanthropy) *Multi-year funding is better than one year grants, especially when your program is successful and grows each year.* (Not-for-profit)
Effective communications	• Clear and open communication • Awareness of grants available • Simple and clear eligibility, application, acquittal processes • Awareness of potential partners available	*1. Clear guidelines on eligibility (Help us) 2. Flexibility (Trust us) 3.Simple feedback processes (Accountability without pain!) 4. Simple mechanisms for sharing success (Encourage us)* (School) *More media attention for Foundations/Trusts and funded project/program to get the message out to the wider community.* (Not-for-Profit) *Improved communication strategies into schools and education bureaucracy.* (Philanthropy)
Role clarity	• Partners in the project or program have clearly defined roles and objectives. • Working strategically in the government or policy context	*Clarity around philanthropy supporting public schools, we don't want to fund what government should be supporting, but we do want to be active in this area.* (Philanthropy) *A clear articulation of who is doing what and what everyone hopes to get out of the relationship.* (Philanthropy) *Work with cooperative government departments to deliver beneficial student outcomes that are in line with publicly declared objectives.* (Not-for-profit)
Relationships based on the foundations of trust	• Agreement over values and priorities • Doing what you say you will do • Perceptions of competence • Flexibility to respond to changing context or situation	*Open and honest feedback even if a program is not successful.* (Philanthropy) *Ensure the project is completed professionally and on time.* (Not-for-profit) *Broad options within a grant to allow for flexibility if situations change.* (School)
Reciprocity	• Equally valuing the contribution of each partner • Two-way and give and take • Mutual benefits • Partners bring their strengths to the relationship • Clearly defined structures and processes for learning and engagement • Sufficient consultation with relevant stakeholders • Team approach to identifying and implementing a project or program	*A clear understanding of the value of each partner in the program.* (Philanthropy) *Forums with foundations and/or trusts* (Not-for-profit) *More forums that bring together schools and foundations and trusts to share ideas and knowledge.* (School)
Impact focused	• Focused on improving the outcomes for learners • Clarity around what you are seeking to change • Careful monitoring of success • Some form of evaluation	*Ensure education is considered in a holistic sense, not just performance data regarding numeracy and literacy but including education towards improved social skills, life skills, general wellbeing and mental health, as well as creativity – a full set of elements which make up the 'whole person'.* (Philanthropy) *Opportunities to meet in person and showcase the programs.* (Not-for-profit) *Understanding potential (what can be achieved) and accountability (what will be expected).* (School)

Do you have an example of engaging with a philanthropic foundation or trust that reflects two or more factors of success?
If so, we would love to hear from you!
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