



DISCOVERY  
RESEARCH  
PREK–12

PI Meeting  
June 9–11, 2025 Arlington, VA



## Fireside Chat with Foundation Representatives

*Moderators: Christopher Harris, WestEd; Ilana Horn, Vanderbilt University*

*Guests: Kimberly Brenneman, Heising-Simons Foundation; Leah Bricker, Spencer Foundation; Meghan McCormick, Overdeck Family Foundation*

In a recent DRK-12 PI Meeting session, representatives from three major foundations—the Heising Foundation, the Spencer Foundation, and the Overdeck Family Foundation—shared insights on their funding models, priorities, and how researchers can position proposals for success.

### Heising-Simons Foundation: Partnership and Flexibility

The Education Program at the Heising-Simons Foundation takes a relational approach, working in partnership with awardees. They accept invited proposals monthly and aim to deliver funding decisions within eight weeks. Responses to this year’s federal funding challenges include safeguarding Head Start initiatives, co-funding “last-mile” needs for existing federal projects, and responsive grants of up to \$25,000 for grantee partners’ urgent organizational needs. While an annual report is required, Heising-Simons offers flexibility—sometimes a brief phone call with a program officer will suffice for a narrative report. Despite some shifting priorities, overall funding levels remain stable, with three active living donors helping to steer direction amid market fluctuations. For early math proposals, California is the main geographic area served.

### Spencer Foundation: Field-Driven, Peer-Reviewed Excellence

The Spencer Foundation funds education research across a variety of grant programs (e.g., Small Grants, Large Grants, Racial Equity Grants, Research-Practice Partnership Grants, and Vision Grants). Spencer is field initiated meaning that calls are open, and Spencer is committed to funding across the field (e.g., with respect to disciplines, topics, methods, contexts). Spencer is also committed to peer review of proposals. They are updating their review processes given the high volume of proposals that are being received. For some grant programs, this will mean a two-stage cycle: researchers submit a concise pre-proposal, and invited full proposals undergo 6–8 months of review. Program officers are available for conversations, and all work—domestic and international—must demonstrate both theoretical advancement and real-world impact, with equity at its core. Once funded, reporting is limited to interim and final reports. Spencer is adopting a new AI policy related to both submitted research proposals and scholars reviewing proposals for the foundation. All applicants will be asked to review the policy before submitting a proposal and proceed accordingly.

### Overdeck Family Foundation: Evidence-Driven Scale

Focused on cost-effective impact, Overdeck offers research funding—typically \$250,000 to \$1.25 million—to grantees with promising results. Monthly board meetings enable nimble decisions. Program officers not only review proposals but also advocate for awardees internally. Overdeck emphasizes

rigorous evidence, particularly calling out a dearth of out-of-school impact studies, and requires quarterly check-ins that center on ROI and troubleshooting. Like other funders, they expect research to remain relevant in an AI-saturated landscape.

## Advice for Success

1. **Do Your Homework.** Dive into each foundation’s website to understand mission, priorities, and grant mechanics.
2. **Build Relationships Early.** Reach out to program officers well before deadlines.
3. **Tailor Your Proposal.** Clearly align your objectives, methods, and evidence plan with each funder’s articulated needs.

In addition, the foundation representatives responded to questions:

## Q&A Highlights

Question	Heising-Simons	Spencer	Overdeck
<b>What counts as evidence?</b>	Focus on positive change and field-level evaluation in early math. Mixed-methods acceptable if aligned with design.	Determined by researchers’ disciplines, as well as the methods they are using	Strong quantitative impact at scale; mixed methods centered on evaluation.
<b>Indirect cost rates?</b>	15% for universities; typically 15% but negotiable for other entities	Up to 15%; projects \$75 K or under carry no indirect.	10% for universities; 15% for nonprofits—will work with budgets to make it fit.
<b>Supplemental funding?</b>	Open to co-funding and top-ups in alignment with interests.	Not available; submit a new proposal.	Open to bridge funding and co-funding.
<b>Communication with other foundations?</b>	Yes. In regular contact with other early math funders. Concept notes are sometimes shared and/or introductions to grantee partners are offered.	Yes. Spencer is in communication with other funders about a variety of topics.	Yes: concept notes are sometimes passed on; Overdeck often serves as connector if a project isn’t a perfect fit for the foundation.