

## The DeBoskey Group's Services for Families and Individuals

The DeBoskey Group provides consulting services on strategic philanthropy and community investments to individuals and families. We work closely with our clients to develop, implement and evaluate philanthropic goals to ensure that charitable giving is consistent with their core values as well as their internal and external objectives. Services for families and individuals include:

### **Defining Goals and Strategies**

- ✓ Work with all stakeholders to examine *internal* motivations for giving – identifying guiding values and establishing desired outcomes of philanthropy for individuals and families.
- ✓ Work with all stakeholders to examine *external* goals for giving – identifying focus areas and establishing desired outcomes for philanthropy, such as preserving something of value (forests, libraries, symphonies, etc.) or changing something of importance in the community, nation or world (reading skills, hunger, climate change, etc.).
- ✓ Help families identify and develop a shared value system for their philanthropic work.
- ✓ Assess historic and current giving and evaluate impact.
- ✓ Develop short and long term strategies to achieve both internal and external philanthropic objectives.

### **Developing and Refining Foundation Tools and Structures**

- ✓ Develop or refine vision and mission statements, grant guidelines, and systems for administering charitable giving.
- ✓ Working with other trusted advisors, help to determine the best vehicles for giving, including family foundations and donor advised funds.
- ✓ If a foundation model is chosen, work with legal counsel to establish guidelines, policies and procedures for effective implementation.
- ✓ For foundations, help members establish board, operations, investment, giving and succession policies that reflect and incorporate philanthropic intent and improve impact.

### **Empowering Families to be More Effective Philanthropists**

- ✓ Provide training to family foundation board members on best practices for foundation governance, grant making and impact evaluation and support their ongoing education as philanthropists.
- ✓ Facilitate and optimize philanthropic discussions at family meetings.
- ✓ Design and implement multi-generational family philanthropic strategies for involving rising generation family members.
- ✓ Establish a structure to help implement family giving and shared value strategies across current, rising and future generations.

### **Creating More Impactful Grantmaking and Investments**

- ✓ Work with board members and other trusted advisors to understand, design and implement creative tools for achieving mission, including impact investing, mission-related investing and program-related investing.

- ✓ Design and implement grant evaluation strategies, dashboards and other tools.
- ✓ Work with trusted legal advisors to establish or refine charitable strategies in estate planning documents.
- ✓ Work with trusted financial and tax advisors to help ascertain optimal charitable capacity and timing for philanthropy.

### **Researching and Negotiating with Nonprofits**

- ✓ Research and identify best-in-class potential local, national and international nonprofit beneficiaries.
- ✓ Research and identify subject matter experts on specific philanthropic issues to educate family members on issues and challenges involved in philanthropy and the role that their philanthropy can play in addressing community issues.
- ✓ Negotiate terms of major gifts on the family's behalf to assure appropriate recognition and impact.

### **Evaluating Impact**

- ✓ Monitor and evaluate milestones and outcomes of philanthropic investments.
- ✓ Evaluate effectiveness of philanthropy in achieving internal and external goals.
- ✓ Design and implement research to evaluate impact.



philanthropic strategists for  
businesses, families  
& foundations

### **Providing Ongoing Support**

- √ Serve as outsourced, part-time staff to ensure that goals and values are reflected in day-to-day giving, organize and oversee family foundation and other charitable activities, and assess family philanthropy staffing needs.
- √ Serve as grant administrators to assist family in monitoring grants, field questions from the public, assure appropriate reports are generated from nonprofit partners, and prepare materials for effective decisionmaking about grants.

**Learn more about our team and our services at [www.deboskeygroup.com](http://www.deboskeygroup.com).**