

## **The DeBoskey Group's Services for Family, Corporate and Community Foundations**

The DeBoskey Group provides consulting services on strategic philanthropy and community investments to family, corporate and community foundations. We work closely with our clients to develop, implement and evaluate their philanthropic goals to ensure that charitable giving is consistent with Mission and strategic objectives. Services for foundations include:

### **Defining Goals and Strategies**

- ✓ Work with all stakeholders to understand *internal* motivations for giving – identifying goals and establishing desired outcomes of philanthropy for the founders and the Foundation.
- ✓ Work with all stakeholders to identify and examine *external* goals for giving - establishing desired outcomes for 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 to establish or refine Vision and Mission Statements.
- ✓ Assess historic and current giving and evaluate impact of philanthropic investments.

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

- ✓ Design, evaluate and refine foundation strategic goals and processes.
- ✓ Create effective grant administration guidelines and systems.
- ✓ Set up grant applications, review processes and evaluation tools.
- ✓ Review grant applications and make recommendations for funding or design processes for others to do the same.
- ✓ Help establish board, operations, investment, giving and succession policies that reflect and incorporate philanthropic intent and improve impact.

- ✓ Assure foundation incorporates “best practices” in all of its philanthropic initiatives.

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

- ✓ Negotiate terms of major gifts on the Foundation’s behalf to assure appropriate recognition and impact.
- ✓ Research and identify potential best-in-class local, national and international nonprofit beneficiaries.
- ✓ Research, evaluate and negotiate with nonprofit partners.
- ✓ Assist with nonprofit beneficiary capacity-building prior to funding.
- ✓ Strengthen foundation board capacity through one-on-one or group training.
- ✓ Prepare for, organize and facilitate board meetings.
- ✓ Assist in the recruitment and selection of board members.
- ✓ Help to determine, establish and facilitate necessary board committees.
- ✓ Work with rising generation members to ensure successful engagement. Work with existing board to create successful, long-lasting leadership succession plans.
- ✓ Conduct seminars for community and public foundation donors on strategic philanthropy.
- ✓ Research and create opportunities for hands-on community outreach and volunteerism.

### **Making Foundation Resources Work for Greater Impact**

- ✓ In a corporate setting, align foundation giving with corporate giving, employee volunteerism and other charitable activities.
- ✓ Organize work with other trusted advisors (e.g., legal, tax, financial, family office) necessary for optimal foundation effectiveness.
- ✓ Assist in the design and development of an online presence.

- √ Work with foundation's Investment and/or Finance Committees to develop investment policies and help identify best-in-class endowment investment advisors.
- √ Work with staff and board members to align investments with mission.
- √ Provide in-depth training on designing and implementing Impact Investing strategies, including Mission Related Investments (MRIs), Program Related Investments (PRIs) and Socially Responsible Investments (SRIs).

### **Evaluating Impact**

- √ Design and implement grant evaluation strategies, dashboards and other tools.

### **Providing Ongoing Support**

- √ Serve as outsourced staff, including Executive Director and Program Officer, on an interim or long-term basis.
- √ Help to ensure that grant recipients are using funds as intended and reporting on outcomes.
- √ Monitor and evaluate milestones and outcomes.

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