



## **Support Services for Family Foundations and Lean-Staffed Grantmaking Foundations**

- **Application and application material review**, editing, and revision, both online and printed materials. Reviews will assess how questions align with the Foundation's goals and decision-making process, as well as with best practices with regard to reducing the overall burden on applicant organizations.
- **Review, editing, and revision of other Foundation material**, such impact reports, FAQs, process summary descriptions, and website content, coordinating with outside designers (as needed) and Foundation staff.
- **Grantee perception and relationship surveys**, both broad, online surveys conducted with all grantees as well as targeted in-person interviews with selected CEOs/Executive Directors to gather additional perspective. Reports include summary of data and information gathered as well as recommendations for future actions.
- **Grantmaking process review and assessment**, as well as review and assessment of decision-making processes. Reviews include a report that summarizes observations and offers recommendations for adjustments to process or for further exploration by the board.
- **Targeted work with a Foundation's board** – through surveys and one-on-one conversations – to identify specific interests and ideas, as well as to deepen their engagement with the Foundation's work. Conversation facilitation at board meetings is also available.
- **Family engagement surveys** used to gather feedback and ideas from many family members, often spanning multiple generations or geographic regions. Reports include summary of information gathered, observations, and recommendations.
- **Design and facilitation of roundtables or small-group gatherings used to convene grantees**. Roundtables can be developed to gather information about the state of the various organizations as well as perspectives on emerging issues that need to be monitored by the Foundation.
- **General coaching and advising for Foundation staff**, providing outside perspective on the field of philanthropy, the nonprofit sector, and the community. Tailored training can be provided for staff who might have less experience with the basics of how nonprofits run.
- **Serve as a general resource for information on grantmaking, philanthropic practice, nonprofit management, and more**. Sharing research reports, summaries of webinars attended, and recommendations for sources of professional development and training for Foundation staff and board.

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