

PRIVATE FOUNDATION SERVICES

ACCOUNTING & BOOKKEEPING MANAGEMENT

Manage accounts payable and accounts receivable for small private foundations (under \$2M budget per year) by coordinating with bookkeeper and accountants.

ADMINISTRATION

Perform general administrative support to small private foundations through communication, maintenance and organization.

- Manage donors
- Organize files and documents

BOARD GOVERNANCE COORDINATION

Works with board members of small private foundations to coordinate timely decisions, reviews and approvals to ensure quality assurance.

- Host board meetings
- Preparation of board packet
- Provide monthly correspondence updates

COMMUNICATIONS

Manage all internal and external communications for small private foundations and serve as the first and main point of contact for the organization.

- Website maintenance
- Communicate with board members, grantees, donors and vendors
- Manage inquiries via mail and email

COMPLIANCE COORDINATION

Monitor compliance for small private foundations to ensure all rules and regulations are met and are in good standing.

- Periodic corporate statements
- Bylaw review and meeting minutes preparation
- Coordination with organization/corporate attorney
- Coordination of annual audit

GRANTS MANAGEMENT

Coordinate all aspects of the grant making program for private foundations to complete and fulfill grant requests in a timing and efficient manner.

- Handle compliance due diligence to confirm organizations are in good standing
- Notify, process and monitor funding and requirements to organizations
- Collect and review reports

FINANCIAL MANAGEMENT

Assist in organizing the financial activities for small private foundations to ensure funding, budgets and investments are managed and handled properly.

- Preparation of annual budget
- Coordination of annual returns
- Coordination with investment advisors
- Coordination with bookkeeper
- Review of monthly and quarterly statements

ONGOING CONSULTING AND TRAINING OR LIMITED ENGAGEMENT

Support improved equity and diversity grant making goals.

